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AUTHOR Everett, Donna R.
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ABSTRACT

This guide presents performance-based authentic assessment ideas, samples, and suggestions to help marketing teachers and students respond to changes and pressures from outside the classroom. It contains 21 activities, each accompanied by a method of authentic assessment. In most cases, the authentic assessment method is a scoring device. The activities are categorized under these topics: communications in marketing; economic concepts; employment and advancement; human relations in marketing; marketing operations; marketing management; advertising and sales promotion; selling; and marketing concepts. Each activity consists of these components: title, learner outcome, competencies, objective, procedures, and additional activities, if any. Types of authentic assessment methods include performance checklists, classroom demonstration, self-evaluation, role playing, story board creation, questionnaires, and poster/collage. (YLB)

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Marketing Education Assessment Guide

Performance-based activities with authentic assessment instruments

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Teri Swift, Brookfield Area Career Center
Cheryl Yung, Warrensburg AVTS

Writer

Donna R. Everett, Assistant Professor, Morehead State University

Editor

Julie Gibbs, Editor, Instructional Materials Laboratory

Marketing and Cooperative Education Staff
Department of Elementary and Secondary Education

Gene Reed, Director
Julie Lyman, Supervisor
Hattie Jenkins, Secretary

Instructional Materials Laboratory Staff
University of Missouri-Columbia

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Jan Trimble, Word Processor
Becky Tieman, Student Assistant
Rhonda Woody, Press I

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Marketing Education Assessment Guide

Introduction

Marketing education makes significant contributions to education, society, and business and industry. Workers in marketing occupations perform critical tasks related to distributing, selling, promoting, and marketing products and services. The need for employees to constantly upgrade, update, refresh, and renew their skills and competencies in order to compete in a global marketplace require changes in knowledge, skills, attitudes, and competencies. The marketing education teacher must address these changes and other pressures from outside the classroom, such as educational reform, societal trends, and technological challenges. These changes and pressures have a direct bearing on the content, delivery, and assessment of identified marketing competencies.

The purpose of this Guide is to present ideas, samples, and suggestions to help teachers and students respond to these changes and pressures. Specifically, this Guide has been developed to help marketing education teachers implement the Performance Standards Based Education approach delineated in the Outstanding Schools Act.

Performance-Based Authentic Assessment

The assessment instruments provided in this Guide are intended to go beyond the "paper and pencil" tests generally associated with assessment. Student success requires the evaluation of projects, presentations, and work that includes the business and industry criteria needed for entry-level employment and advancement. The emphasis in performance-based assessments is the real world. Authentic assessment scoring devices (or tools) are designed to assist in clarifying and communicating these criteria. Authentic assessment scoring devices contain specific information about what is expected of students for every performance standard and are designed to make the criteria very objective, clear, and specific.

How to Use the Marketing Education Authentic Assessment Scoring Devices

A method of authentic assessment accompanies each of the learning activities in this Guide. In most cases the authentic assessment method is a scoring device. The scoring device is based on a generic device that was developed as follows:

Step 1: Look at the goals of the marketing education competencies. The learner outcomes and the competencies for each of the instructional units can be summarized in the following workplace skills:

- Communications
- Creative Thinking
- Ethical Responsibility
- Informed Citizenship
- Initiative
- Interpersonal Skills
- Problem Solving

Step 2: Incorporate Missouri's Performance and Knowledge Standards. A separate project cross referenced the marketing education instructional units with Missouri's performance and knowledge standards. (See *Marketing Education Frameworks* [IML Catalog # 80-0010-I].) The learning activities in this Guide include the performance and knowledge standards that were cross referenced to the learner outcome.

Step 3: Develop specific criteria for each of marketing education's instructional unit. The nine instructional units include learner outcomes and competencies that were validated in a previous marketing education project and are also detailed in the Frameworks document.

These steps ensure that each assessment instrument (such as the sample on page vii) rates students on the traits and characteristics needed to succeed in a marketing career. The activities and assessment instruments contained in this Guide are merely suggestions; they can be modified to meet the specific requirements of a local program. In addition, these activities and assessments instruments were created to provide a foundation for marketing educators to create their own assessment instruments.

Sample Assessment Instrument for Employment and Advancement

Directions

Rate the student on each of the following items by circling the appropriate numbers. If the item does not apply, circle NA (Not Applicable). Add comments to the bottom of the page that may help the student.

Item	1	2	3	4	5	NA
Overall, I would rate this student as:	Very work-oriented	Work-oriented except when faced with deadlines	Work-oriented only with non-routine tasks	Work-oriented on some days	Not work-oriented	Does not apply
Communications	Excellent	Very good	Average	Fair	Poor	Does not apply
Creative Thinking	Always has new ideas	Has new ideas when prompted	Ideas are not original	Rarely exhibits interest in new ideas	No new ideas at all	Does not apply
Ethics	Displays high standards	Displays high standards under most conditions	Displays acceptable standards	Questions the value of standards	Standards are never in evidence	Does not apply
Informed Citizen	Well-informed	Informed on most items	Informed only about certain items	Appears to resist information	Never informed	Does not apply
Initiative	Very independent	Indpendent except when faced with new situation	Dependent only on non-routine tasks	Dependent	Very dependent	Does not apply
Human Relations	Excellent	Very good	Average	Fair	Poor	Does not apply
Problem Solving	Creative, a thinker; faces challenges squarely	Creative except in new areas	Operates within established guidelines	Follows directions only	No evidence of thinking or creativity	Does not apply
Comments:						

Classroom Demonstration: Teaching a Skill

Learner Outcome

A3 Train employees

Competencies

A3a Teach individual employees to perform job duties
A3b Give oral presentations to groups of marketing personnel

Objective

All new employees need on-the-job training. Supervisors conduct training or delegate the training of a new employee to an experienced employee. Job training may include orientation to company policies and facilities, information about personnel benefits and payroll, site tours, introductions to coworkers, specific job duties and procedures, and rules for operating and caring for equipment. A critical skill for all employees is knowing how to train and teach coworkers to perform job duties or complete specific tasks. Class discussion should focus on the orientation and training students have received in their co-op or summer jobs. This assessment project provides students with the opportunity to write directions for operating a piece of equipment used in a marketing job, to demonstrate the proper use of the equipment, and to evaluate the directions as students in the classroom try to follow them. By writing directions for operating a piece of equipment (cash registers, computers, etc.), using the directions to teach another person, and receiving feedback, students have mastered a critical high performance workplace skill.

Procedures

1. Have students choose a piece of equipment used in a marketing job such as a cash register, computer (hardware or software), window display, or other equipment. If the equipment is not available in the classroom, the students will need to bring it to class.

2. Give the students one day of class time to write the operating procedures for the equipment. They may use notes, manuals, or work procedures from their job to write the procedures. The procedures should be keyed in a format that is easy to read and to teach from. Teacher assistance should be available during the class time.

3. After students have completed the written directions, have students use another class day teaching other students how to operate the equipment. Students should be encouraged to provide feedback to the trainer.

4. Have the student demonstrate how to operate the equipment to the class for evaluation. There are 100 total possible points: 50 points for the written procedures and 50 points for the demonstration and training.

Additional Activity

After the students have written their directions, divide the class into groups and ask students to train small groups. Rotate students among the groups until each student has had the opportunity to teach the procedures to use the equipment to all groups. Then have the students discuss how and why they felt their procedures changed each time they trained/taught a new group of students.

Performance Checklist for Written Procedures

For each statement listed below, assign a rating based on the following scale:

5 = **Excellent**: Student successfully completes the activity and displays mastery of the equipment and procedures; writing is clear and precise.

4 = **Good**: Student completes the activity with good quality and mastery; writing is mostly clear.

3 = **Average**: Student completes the activity with minimal mastery; writing is acceptable.

2 = **Needs Improvement**: Student completes the activity without demonstrating mastery of the equipment or procedures; written procedures are unclear and hard to follow.

1 = **Not Acceptable**: Student needs additional time to master the equipment and procedures; totally unprepared; written instructions are poor.

0 = Student did not complete the assignment.

1.	Student displays mastery of equipment.	5 4 3 2 1 0
2.	Student displays mastery of the functions of the equipment.	5 4 3 2 1 0
3.	Student displays mastery of the parts of the equipment.	5 4 3 2 1 0
4.	Student correctly outlines the procedures for operating the equipment.	5 4 3 2 1 0
5.	Student correctly lists the specific steps to complete the procedures for operating the equipment.	5 4 3 2 1 0
6.	Student tests the steps him/herself after writing the first draft.	5 4 3 2 1 0
7.	Student revises the procedures in a timely fashion.	5 4 3 2 1 0
8.	Student keys the procedures in proper format and prints the procedures.	5 4 3 2 1 0
9.	Student successfully completes the project.	5 4 3 2 1 0
10.	Student demonstrates mastery of writing directions.	5 4 3 2 1 0

Total Points ____/50

Classroom Demonstration/Teaching Evaluation

Name _____

Use the following scale to evaluate the demonstration and teaching of the equipment:

5 = Excellent
4 = Good
3 = Average
2 = Fair
1 = Unsatisfactory
N/A = Not Applicable

In demonstrating/teaching the equipment, the student:

1.	Selected a piece of equipment that could be demonstrated.	5	4	3	2	1	N/A
2.	Set up the equipment where it could be easily viewed by each student.	5	4	3	2	1	N/A
3.	Had all material ready to use.	5	4	3	2	1	N/A
4.	Defined terms or gave background information when necessary.	5	4	3	2	1	N/A
5.	Performed the steps to operate the equipment in logical order.	5	4	3	2	1	N/A
6.	Followed his/her written procedures.	5	4	3	2	1	N/A
7.	Asked for feedback/questions during the demonstration.	5	4	3	2	1	N/A
8.	Observed students to see that they were following the directions.	5	4	3	2	1	N/A
9.	Maintained eye contact with all students.	5	4	3	2	1	N/A
10.	Exhibited a businesslike manner.	5	4	3	2	1	N/A

Total Points _____/50

Performance Criteria:
Excellent 50-40; Good 39-30; Average 29-20; Fair 19-10; Poor 9-0.

Stop! Look! Listen!

Learner Outcome

A4 Use oral communications in marketing

Competencies

A4b Use proper listening skills
A4c Demonstrate effective telephone techniques and manners in a business situation
A4d Use non-verbal communication to help convey feelings
A4e Listen to and follow directions
A4f Address people properly

Objective

Knowing how to listen to and follow directions from peers and supervisors ensures that work is completed correctly, completely, and in a timely fashion. This assessment project evaluates the students' listening skills by having them listen to the directions from another student for operating a piece of equipment. (See *Classroom Demonstration: Teaching a Skill* for setting up the demonstration exercise.)

Procedures

1. Discuss the following guidelines/suggestions for listening:
   - Concentrate on what the speaker is saying, not on the speaker's appearance.
   - Listen with paper and pencil in hand to take notes of important ideas or details.
   - Listen for a pattern in the presentation: e.g., information in alphabetical, chronological, or sequential order.
   - Make a note of any point that was confusing (use an * or underline) and continue listening.
   - Ask questions, if allowed, but interrupt politely.
   - Verify understanding.
   - Don't let your mind wander; keep focused on the subject.
   - Ignore outside noises.
   - Watch for non-verbal cues that emphasize important points.
   - Separate your biases from the speaker's.
   - Make eye contact with the speaker when appropriate.

2. Prior to the demonstration, ask students to write at the top of the page "Procedures for _____." (When using this assessment activity during a class lecture, ask students to write an appropriate heading.)

3. Have students list the directions for operating the equipment as they are given by the speaker.

4. After the demonstration, have students quickly review their list of directions to add any important items left out, using a different color of ink or some other appropriate indication. (Three to five minutes usually is enough time for students to look over their notes.)

5. Have students share their lists with another student for feedback on the completeness and accuracy of their lists.

6. Have the students turn in their written instructions for evaluation. There are 50 total possible points for the project: 25 points for the written list and 25 points for evidence of listening.

7. After the evaluation, share the lists with the demonstrator for feedback on completeness and accuracy of his/her directions. The students' lists serve as a valuable assessment of the students' teaching/training abilities.

Additional Activities

This assessment exercise also could be completed in groups to create a collective list.

After the lists are developed from the directions, divide the class into groups and ask students to use their list of directions to teach another person. Ask for feedback from the other person: Were the directions complete? What was omitted? Was the omission an important point?

Have the students discuss how they felt about the value of listening to directions and how this activity could be applied on the job. Ask for specific examples.

Use this exercise as part of a class lecture in which marketing or economic concepts and/or terms are given. After the lecture, ask students to list and quickly define five to seven fundamental concepts or terms related to the subject of the lecture. Read through the lists for accuracy, completeness, and understanding. Provide feedback at the next class. Reteach where appropriate.

Performance Checklist for Following Directions

For each statement listed below, assign a rating based on the following scale:

5 = **Excellent**: The student successfully completed the activity and displayed mastery of listening procedures from oral directions.

4 = **Good**: The student completed the activity with good quality of listening procedures from oral directions; minor points omitted.

3 = **Average**: The student completed the activity with minimal mastery of listening; major points missing.

2 = **Needs Improvement**: The student completed the activity without demonstrating mastery of listening; final list was unclear and hard to follow.

1 = **Not Acceptable**: The student cannot make a list from oral directions; no mastery displayed.

0 = The student did not complete the assignment.

1.	Student correctly lists the steps to complete the procedures for operating the equipment from oral directions.	5 4 3 2 1 0
2.	Student tests the steps him/herself after writing the directions.	5 4 3 2 1 0
3.	Student revises the procedures in a timely fashion.	5 4 3 2 1 0
4.	Student demonstrates mastery of writing directions from oral instructions.	5 4 3 2 1 0
5.	Student successfully completes the exercise.	5 4 3 2 1 0

Total Points ____/25

Listener's Self-Evaluation

Directions

Refer back to the listening exercise you have just completed. Analyze your experience by answering the following questions:

1. What helped you to be an effective listener? List important points that help a person to be a good listener. (Your answer is worth five points.)

2. What can you do to become a better listener than you are right now? Try to think of a situation where you (or someone else) did not listen carefully. Identify what you might have done to be a better listener. Write your suggestions below. (Your answer is worth five points.)

3. Rate your listening skills on the following scale. Be honest about your listening abilities as of right now.

Good Listener **Poor Listener**

15 14 13 12 11 10 9 8 7 6 5 4 3 2 1

Total Points ____/25

Assessment Instrument for Communications in Marketing

Directions

Use the dimensions of this assessment instrument to rate the student on communication skills, such as understanding the communication process, using peer-to-peer communication, interpreting communication, training or teaching others, and using oral and written communication.

Criteria	5 pts.	3 pts.	1 pt.	
Communications (Overall)	**Excels**	**Acceptable**	**Not yet acceptable**	**Points**
Creative Thinking	Uses a variety of communication tools; communications are always clear; shows a good command of language.	Communication is acceptable at the 70% rate; command of language is average.	Communication is minimal; does not have a clear command of oral or written skills; usually scores at 69% or below.	
Ethical Responsibility	When appropriate, communication is accurate and neutral.	Sometimes does not check the accuracy or validity of communication.	Communication is faulty; no attempt is made to check accuracy or validity of communications.	
Informed Citizenship	Takes necessary time to read, ask questions, and understand information before communicating.	Only minimum number of facts are checked or understood before communication; depth is lacking.	Does not take time to check facts, ask questions, or try to understand before communicating; reacts.	
Initiative	A self starter; allows enough time to complete work in a timely fashion; a recognized leader.	Sometimes allows enough time to complete work; work and communication are average at the 70% level.	Work is always late; no evidence of planning or organization; communication is sloppy.	
Interpersonal Skills	Communicates well with others; uses appropriate language and methods; teaches well.	Communication is average with others; needs assistance to determine method or language; teaching skills are average.	Communicates poorly with peers and teachers; lacks organization and planning of any communication; therefore, cannot teach.	
Problem Solving	Logically and thoughtfully approaches task or problem to be completed or solved; communication is well planned and appropriate.	Identifies problem and, with assistance, can plan, complete, and solve the task or problem; communication is average.	Cannot identify problem or task or determine solution or plan; communication is lacking.	
Total Points				
Comments				

Economics in Bits and Bytes

Learner Outcome

B3 Understand economics and economic activities

Competencies

B3a Define economics as a process
B3b Identify economic activities
B3c Explain the importance of understanding economics
B3d Identify the major types of economics resources
B3e Identify examples of economic resources according to major type
B3f Compare and contrast the characteristics and values of three major economic systems
B3g Explain the four types of economic utility (form, time, place, and possession)
B3h Describe the business cycles

Objective

In this project, students will search for and find economic statistics and concepts on the Internet in order to write a short paragraph demonstrating understanding and use of the statistic and/or concept. Students will share their paragraphs in a class discussion of economics and economic activities, then turn in their paragraphs for evaluation. A scenario has been developed to provide students the opportunity to contribute knowledge and understanding of various economic concepts. Students will assume a role in the scenario.

Procedures

1. Provide each student with a copy of the *Economics in Bits and Bytes Worksheet*.

2. Have students access at least one of the Internet sites below and, using keywords, search for information about economics, economic indicators, latest information about the economy, etc. to complete the worksheet.
   www.yahoo.com/economy
   webcrawler.com
   www.lib.umich.edu/libhome/Documents.center/stecon.html
   Provide one day of class time to access the Internet. Teacher assistance should be available during the class time.

3. After students have accessed and read the information from the Internet site, have them print the information for a reference as they complete the worksheet. Have the students assume that they are assisting their managers with a "state of the economy" report for a marketing client.

The information for each indicator should be short (40-50 words) and accurate. They may need to read the information several times to be able to condense it or keep searching until they find another source that is easier to understand. A finished paragraph may look like this:

> *The Government issued a report today that new home sales for the current month are up 1.2%. This is a 2% increase over this time a year ago. New home construction also increased by 1.2% during the current month, according to the same report.*

4. After students have completed the worksheet, have them share their short paragraphs with other class members.

5. Have the students turn in the worksheet for assessment. There are 50 total possible points for the worksheet.

Alternative Activities

Students could complete this exercise in small groups and make a formal presentation to the class.

Students could peer evaluate the worksheets before turning in for final evaluation by the instructor.

Economics in Bits and Bytes Worksheet

Directions

Assume that you work for a large marketing consulting firm. The firm has been hired by a customer who is seeking specific information about the economy. You are working with your supervisor to provide the customer with the latest information on the health of certain aspects of the economy. The customer needs the information in order to make a decision about expanding the company's product line. You have volunteered to look up the latest information on the Internet. You will use the Web browser in your classroom to access and complete the information below by summarizing the information you locate in short bits and bytes of information. The URL of the Internet site where you received your information must be included with each question. Your information will be included in the final report to the customer.

1. First economic indicator: **The Housing Industry** or **Housing Starts**.

URL:

2. Second economic indicator: **Advance Monthly Retail Sales**.

URL:

3. Third economic indicator: **Current Economic Indicators**.

URL:

4. Fourth economic indicator: **Production and Business Activity**.

URL:

5. Fifth economic indicator: **Consumer Price Index (CPI)**.

URL:

6. Sixth economic indicator: **Inflation**.

URL:

7. Choose an additional economic indicator that you think the customer would like to know about: cost of living, business starts, international trade, manufacturer's shipments, wholesale trade, etc. Write in the term and short explanation below.

URL:

Share the information you found with the class. Turn in your completed exercise to your teacher for final evaluation.

Worksheet Evaluation

For each statement listed below, assign a rating based on the following:

10 = **Excellent**: The student successfully completed the activity and displayed mastery of the search capabilities of the Internet; written definitions were clear and accurate.

8 = **Good**: The student completed the activity with good quality and mastery; occasionally asked for assistance; written definitions were adequate.

6 = **Average**: The student completed the activity with minimal mastery; unsure of Internet search capabilities; writing is acceptable.

4 = **Needs Improvement**: The student completed the activity without demonstrating mastery of Internet search capabilities; written definitions were unclear and hard to follow.

2 = **Not Acceptable**: The student needs additional time to master the Internet; totally unprepared; written definitions were poor.

0 = The student did not complete the assignment.

(10-8 points)	(6-4 points)	(2-0 points)	Activity
			Demonstrated ability to use Internet tools to locate information.
			Provided URLs for each economic definition or term.
			Information was readable, timely, and accurate.
			Seven definitions are completed.
			Activity was completed on time.
			Total Points (50 points possible)

Playing Your Cards Right in Economics

Learner Outcome

B3 Understand economics and economic activities

Competencies

B3a Define economics as a process
B3b Identify economic activities
B3c Explain the importance of understanding economics
B3d Identify the major types of economics resources
B3e Identify examples of economic resources according to major type
B3f Compare and contrast the characteristics and values of three major economic systems
B3g Explain the four types of economic utility (form, time, place, and possession)
B3h Describe the business cycles

Note: This assessment activity could be applied in all areas of the Economic Concepts frameworks—business risks, government regulations, private enterprise system, supply and demand, and Gross Domestic Product—wherever teachers want students to be able to apply the terminology, concepts, and theories of economics.

Objective

Understanding economic concepts, theories, principles, and terminology will aid marketing professionals in creating, advertising, and selling their products and services. In this activity, students will create application cards to facilitate their learning and understanding of economic concepts and principles. Students will write at least one short, real-world application for what they have learned about economics. The cards will be used in class for review and reinforcement. Students will turn in their cards for evaluation.

Procedures

1. Identify important—and clearly applicable—economic principles, theories, definitions, or concepts that students are studying or have just studied.

2. Decide how many application cards the students will develop and how much time will be allowed for classroom review. Students will develop one card per principle, theory, definition or concept. (One to three cards should be enough, depending on the concept or theory.)

3. Give students class time to develop the application cards (or assign for homework). Students use one side of the card to write the definitions, theories, or principles and the other side to write an example or application. The students should come up with fresh ideas or their own definitions for the terms without looking at the textbook.

4. After students have completed the cards, gather the cards, pass them out randomly, and have students assess the value of the examples or definitions.

5. Use one day of class time to review the cards with the class before a test. There are 50 total possible points for the application cards.

Alternative Activities

Students could complete this exercise in small groups.

Students could access the definitions or examples from sources on the Internet. Use the sites in the *Economics in Bits and Bytes* assessment exercise.

Activity Evaluation

10 = **Excellent**: The student successfully completed the activity; written definitions are clear and accurate.

8 = **Good**: The student completed the activity with good quality and mastery; occasionally asked for assistance; written definitions are adequate.

6 = **Average**: The student completed the activity with minimal understanding of economics; written definitions are adequate.

4 = **Needs Improvement**: The student completed the activity without demonstrating mastery of economics in marketing; definitions are poor.

2 = **Not Acceptable**: The student needs additional time to master economic concepts in Marketing; totally unprepared; written definitions are poor.

0 = The student did not complete the assignment

(10-8 points)	*(6-4 points)*	*(2-0 points)*	*Activity*
			Completed the activity on time.
			Definitions or examples are original.
			Definitions or examples are linked to real-world applications.
			All definitions are completed.
			Students displays knowledge of the importance of economics in marketing education.
			Total Points (50 points possible)

What Am I Bid?

Learner Outcome

B7 Understand the relationship between supply and demand

Competencies

B7a Recognize that economic goods are the products and services offered to meet consumer needs and wants
B7b Define supply and demand
B7c Distinguish between buyer's and seller's markets
B7d Describe the influences and interactions of supply and demand

Objective

In this activity, students will reinforce their learning and understanding of supply and demand by bidding for a product in an auction. Students also will demonstrate their understanding of economic concepts, theories, principles, and terminology, which aid marketing professionals in positioning and pricing their products and services in the marketplace.

Procedures

1. Review terms and concepts related to supply and demand by having students:
   - Define scarcity, demand, law of demand, supply, law of supply, law of supply and demand, buyer's market, seller's market, elasticity, elastic, inelastic, price, relative prices, incentives, rationing, equilibrium price, excess supply, excess demand, and market price.
   - Explain why wants are unlimited and why scarcity exists.
   - Describe how the laws of supply and demand affect businesses.
   - Explain the importance of understanding elasticity and factors which affect it.
   - Describe factors which affect demand and supply.
   - Describe the functions of relative prices and their significance to business and consumers.
   - Explain the importance of price in business and how prices are determined.
   - Explain how producers respond to excess supply and demand.

   Students could write a short paragraph that demonstrates their understanding of these economic principles and terms.

2. Choose a product or service to auction off. The product should be a new product or one that is popular with the students. To complete the intent of this activity, there should be at least one product for each student in the class.

3. Hold the auction for one product. Start the auction by showing that only one product is available. Have the students bid on the product using money from a board game.

4. Gradually increase the number of products that are available. Ask for bids each time a product is offered.

5. At the end of the auction, ask students to discuss how their desire for the product increased or decreased based on availability, what the basis for their bids was, and how the price of the product was affected.

Alternative Activities

Individually or in groups, students invent a product to be purchased by teenagers. The student must provide a pricing structure, supply and demand curves, and the equilibrium price for the invented product. Students will then auction their product to a group of their peers to determine if the pricing structure meets demand.

Matching Terminology Assessment Instrument

Instructions

For each of the following definitions, select the term that best defines the statement and write the letter of that term on the line in the *Answers* column. (Each answer is worth 5 points; there are 100 possible points.)

A. Scarcity
B. Demand
C. Law of demand
D. Supply
E. Law of supply
F. Law of supply and demand
G. Buyer's market
H. Seller's market
I. Elasticity
J. Elastic
K. Inelastic
L. Price
M. Relative prices
N. Incentives
O. Rationing
P. Equilibrium price
Q. Excess supply
R. Excess demand
S. Market price
T. Equilibrium

1. ___ Condition that exists when the amount of product supplied is equal to the amount of products demanded.
2. ___ Consumer willingness and ability to buy products.
3. ___ Amount of goods producers are willing to make and sell.
4. ___ If the price is low enough, demand for the product usually increases.
5. ___ At a higher price, producers will offer a larger quantity of products for sale; at a lower price, they will offer fewer products.
6. ___ The price at which both the marketer and the customer make an exchange.
7. ___ Value of money (or its equivalent) placed on a good or service.
8. ___ Products that are more expensive than premiums that are earned and given through contests, or as sweepstakes awards.
9. ___ Value of money (or its equivalent) placed on a good or service in relation to its competition.
10. ___ The interaction of consumer willingness and ability to buy products or services and the number of products producers are willing to make.
11. ___ Difference between needs and wants and available resources.
12. ___ The tendency for prices to go up and down, depending on supply and demand.
13. ___ The degree to which demand for a product is affected by its price.
14. ___ The situation in which a change in price has very little effect on demand for a product or service.

15. ___ The result when producers put a quota or limit the number of products or services available to consumers.
16. ___ The price of a product or service used by a producer or marketers to be close to, or equal to, a competitor's or to the average price.
17. ___ When buyers' demands determine the price of a product.
18. ___ When prices of a product or service are determined solely by the producer or marketer.
19. ___ When buyers' needs and wants for a product create scarcity.
20. ___ When producers' oversupply of a product or service creates the need for incentives.

Matching Terminology Answer Sheet

1. T
2. B
3. D
4. C
5. E
6. P
7. L
8. N
9. M
10. F
11. A
12. I
13. J
14. K
15. O
16. S
17. G
18. H
19. Q
20. R

Practice Your Marketing Employment Skills: Part 1

Learner Outcome

C2 Complete a marketing employment interview

Competencies

C2a Develop a confident attitude when participating in an employment interview
C2b Meet the standards of appearance and behavior required for the interview
C2c Complete a personal resume and letter of application
C2d Complete employment application forms for marketing employment
C2e Recognize the purposes and types of employment tests and general guidelines for taking time
C2f Complete a personal interview and follow-up activities
C2g Identify ways of integrating school and work experiences together

Objective

All prospective employees must know how to interview for a job, as well as know all of the accompanying strategies for preparing for the job interview. In the high-performance workforce, advanced preparation and planning for the interview will give individuals a competitive edge. The goal of this assessment project is to provide students with the opportunity to acquire skills in interviewing for a marketing job. In this project, students will create an interview portfolio that includes an article on interviewing, a graphic or picture of the proper dress for an interview, their resume, a completed employment application, and a list of sample interview questions with answers. Students will also participate in a mock or real job interview.

Procedures

1. Have students collect items for an interview portfolio. The portfolio should include, but not be limited to, the following items:
   - An article on effective interviewing skills with key points underlined. The Internet is an excellent resource for the latest articles. Interviewing articles are available at the following sites:
     www.all-biz.com/quests.html
     www.jobtrak.com
   - A graphic or picture of correct interview dress.
   - A completed employment application.
   - A resume.
   - A list of sample interview questions with answers (based on article and class discussions and listings).

and possible answers. Teacher assistance should be available during the class time. Samples of employment applications should be available for students to complete.

3. Have students find an advertisement in the newspaper or other source for a job for which they feel qualified and call to arrange an interview for the job. Or arrange for members of an advisory committee or other human resource professionals to come into the classroom and interview students during class time.

4. After the interview, students should write a short report, evaluating the experience. The written report should contain the following information:
   - Name of company
   - Title of the job,
   - Name and title of the interviewer
   - Date and length of the interview
   - Description of the office
   - Attitude of the interviewer
   - Interview questions (expected and unexpected)
   - Description of the job given by the interviewer
   - Employment tests required (if known)
   - Follow-up required on the part of the interviewer or interviewee
   - Conclusion of the interview
   - General comments that might include additional preparation on the part of the interviewee

5. After students have completed the written evaluation of the interview experience, devote another class day to students sharing their reports with the class.

6. Have the students turn in their interview portfolio for assessment. There are 50 possible points for this activity: 25 points for the interview portfolio, 15 points for the participating in or setting up interview, and 10 points for the written interview evaluation.

Activity Checklist

For each statement listed below, assign a rating for the items to be evaluated based on the following scale:

Excellent: The student successfully completed the activity with all required items with no assistance.

Good: The student completed the activity with all items; required some assistance from the teacher.

Poor: The student completed the activity with 2 or more items missing from the portfolio and written interview evaluation; teacher assistance was necessary to complete interview.

Not Acceptable: The student did not complete the activity; three or more items missing from portfolio; job interview was not completed.

Excellent/ Good	Poor/ Not Acceptable	Activity	Comments
(5 - 3 pts)	(2 - 0 pts)	Interview portfolio presentation is exemplary. (0 - 5 points)	
(5 - 3 pts)	(2 - 0 pts)	Items in the portfolio were error-free and of high quality. (0 - 5 points)	
(5 - 3 pts)	(2 - 0 pts)	Information was readable, timely, and accurate. (0 - 5 points)	
(5 - 3 pts)	(2 - 0 pts)	Portfolio was completed on time. (0 - 5 points)	
(5 - 3 pts)	(2 - 0 pts)	All items were included in the portfolio. (0 - 5 points)	
(15 - 9 pts)	(8 - 0 pts)	Job interview was arranged and completed. (0 - 15 points)	
(10 - 6 pts)	(5 - 0 pts)	Written evaluation of job interview was turned in on time. (0 - 10 points)	
Total Points ____/50			

Practice Your Marketing Employment Skills: Part 2

Learner Outcome

C2 Complete a marketing employment interview

Competencies

C2a Develop a confident attitude when participating in an employment interview
C2b Meet the standards of appearance and behavior required for the interview
C2c Complete a personal resume and letter of application
C2d Complete employment application forms for marketing employment
C2e Recognize the purposes and types of employment tests and general guidelines for taking them
C2f Complete a personal interview and follow-up activities
C2g Identify ways of integrating school and work experiences together

Objective

The purpose of this project is to place students in the role of the interviewer. This role gives students a different perspective of a job interview—the employer's perspective. This assessment project provides students with the opportunity to apply interviewing skills as an interviewer. In this project, students will create an advertisement for a job and "accept" applications from other students for the position. The student will assume the role of the interviewer and interview one or two students for the advertised job. To complete the activity, the student interviewer will review a completed job application, review a resume, and conduct a job interview. The written evaluation from part one of this activity should provide the basis for setting up the interview environment, conducting the interview (using legal questions), and making an assessment of the applicant.

Procedures

1. Have students write an advertisement for a marketing position. (If necessary, provide samples of job advertisements as references.)

2. Have students submit their advertisement for "publication" in the classroom. A bulletin board or other device (perhaps a class newsletter) could be used to advertise the positions.

3. Have students write the procedures they will use during the interview, such as review applications and resumes, greeting the applicant, a list of questions to ask (including asking for questions from the applicant), concluding the interview, and deciding on the person for the position.

4. Devote class time allowing for at least two interviews by each student. During the interviews, the teacher should observe the interviewers to provide them with feedback.

5. After the interview, students should write a short report, evaluating the experience as interviewers. The written report should contain the following information:
   - Advertisement for the job (including title)
   - Procedures that were used during the interview
   - Names of applicants
   - Length of the interview
   - Evaluation of their performance as the interviewer
   - Applicant chosen for the position and why
   - General comments that might include additional preparation on the part of the interviewee and interviewer

6. After students have completed the written evaluation of the interview experience, devote another class day to students' sharing their reports with the class.

7. Evaluate the student's interviewer skills. There are 50 points for this activity: 15 points for interview preparation, 15 points for participating in or setting up the interview, 10 points for the written interview evaluation, and 10 points for observation feedback.

Activity Checklist

For each statement listed below, assign a rating for the items to be evaluated based on the following scale:

Excellent: The student successfully completed the activity with all required items with no assistance.

Good: The student completed the activity with all items; required some assistance from the teacher.

Poor: The student completed the activity with constant teacher assistance.

Not Acceptable: The student did not complete the activity.

Excellent/ Good	Poor/ Not Acceptable	Activity	Comments
(5 - 3 pts)	(2 - 0 pts)	Written job advertisement was informative. (0 - 5 points)	
(5 - 3 pts)	(2 - 0 pts)	Interview questions were appropriate and legal. (0 - 5 points)	
(5 - 3 pts)	(2 - 0 pts)	Interview procedures were well thought out. (0 - 5 points)	
(15 - 9 pts)	(8 - 0 pts)	Interview was completed in a timely fashion. (0 - 15 points)	
(10 - 6 pts)	(5 - 0 pts)	Written evaluation of job interview was turned in on time. (0 - 10 points)	
Total Points ____/40			

Observation Checklist

The checklist below can be used by the teacher to assess the student interviewer's performance during the interview. Total possible points is 10; count the check marks (✓) in the **Yes** column to determine the number of points earned.

Yes	No	Criterion
		Interview area was clean and appropriate; student interviewer was dressed professionally.
		Student interviewer greeted the applicant with a handshake, smile, appropriate eye contact, and an introduction.
		The student interviewer demonstrated that s/he was prepared, i.e., had read interviewee's application and resume.
		During the interview, the student interviewer maintained eye contact and appeared interested in the applicant.
		Student interviewer asked appropriate legal questions of the applicant.
		Student interviewer made notes of the applicant's responses.
		Student interviewer asked the interviewee if s/he had any questions.
		Student interviewer appropriately ended the interview, i.e., gave the applicant an idea of when to expect a decision.
		Student interviewer ended interview with a handshake.
		Student interviewer quickly reviewed notes after the interview.
		Total Points

Eeny Meeny Miny Mo—Which Way Should I Go?

Learner Outcome

C3 Identify a marketing occupation objective

Competencies

C3a Identify personal occupational requirements
C3b Describe entry-level marketing jobs available in most communities
C3c Identify possible advancement patterns
C3d Identify a tentative marketing occupational interest
C3e Develop a tentative career plan

Objective

Marketing careers cover a wide variety of occupations in an increasing array of industries. Students in marketing can choose from careers in sales, advertising, fashion merchandising, hospitality (hotel and restaurant management, travel and tourism, and recreation), banking and finance, and sports and entertainment. By identifying their individual interests, students can research their personal skills, aptitudes, career knowledge, education, and opportunities that are available in the area of marketing they choose. This project provides students with the opportunity to research a marketing career in one area of marketing.

In this project, students will choose an occupational area in which they are interested or for which they feel they are qualified. Students will research job opportunities, job outlook, skills needed or desired, education required to compete for an entry-level position, and share the information they find in written and oral presentations. To enhance the information, presentation software should be used to present the information to the class.

Procedures

1. Have students choose a marketing occupation that interests them.

2. Have the students conduct research using both traditional and electronic resources. The research should include, but not be limited to, the following areas:
   - Occupational Outlook Handbook that includes statistics that support the need for the occupation.
   - Number of jobs currently available. Information can be gleaned from listings on the Internet. Students should access at least three of the following or other URLs to get a broad view of the occupation:

www.careermosaic.com	*www.careerpath.com*	*www.job-hunt.org*
www.monster.com	*www.ajb.dni.us*	*www.espan.com*
www.occ.com		

- Job titles included in the industry or occupational area.
- Skills required (personal and technical skills).
- Experience needed.
- Education required.
- Recommended internships or cooperative education experiences.
- People who are in the occupation
- Companies that hire entry-level personnel in the occupation. The company's Internet home page should be located and accessed. The students should print relevant pages from the company's Web site, such as organization chart, product or service information, etc.

3. Have students interview one person in the occupational area either in person, over the telephone, through correspondence, or on the Internet, if accessible.

4. Have the students write a report that includes the information gathered, making sure the report includes the following information:
   - The need for the occupation—the historical, social, economic, and environmental impacts on society.
   - The careers in the occupational area.
   - The employment opportunities in the occupation.
   - The skills (personal and technical) needed to compete for an entry-level position.
   - The experience and education requirements.
   - The names of companies and people in the occupational area.
   - The results of the interview or correspondence with one individual in the occupational area.

5. Have the students present the written report to the class, using presentation software to enhance the material. The activity is worth 110 points: 60 points each for the written assignment, and 50 points for the oral report. The students may also evaluate the oral report.

Additional Activities

Students could create a database of companies who hire in the occupational area.

Use a desktop publishing software program to create signs illustrating opportunities in the occupational area.

Use desktop publishing software to create a brochure illustrating opportunities in the occupational area.

Prepare a flowchart depicting the career ladder in the occupational area.

Shadow a person in the occupational field and create a job description for the position.

Invite guest speakers from a variety of occupational areas into the classroom.

Arrange field trips to visit local businesses related to various occupational areas.

Marketing Education Assessment Guide

Assessment Sheet for Written Assignment

Component	Demonstrated Competence (5 Points Each)	Satisfactory (4 Points Each)	Inadequate (3 Points Each)	Points
Introduction	Attracts reader's attention; introduces topic; sets tone.	Attempts to attract reader's attention; introduces topic; tone is ambiguous.	Indirectly states topic.	
Body: strategy and organization	Sufficient examples, illustrations, statistics to support message. Reader is informed; benefits.	Attempts to use examples to support strategy; some are supported adequately. Reader may feel some satisfaction.	Lacks any support: doesn't show, just tells. Reader is overlooked.	
Body: fluency, clarity, and coherence	Ideas and paragraphs are logically developed and coherent. Good use of transitions.	Some concepts are logically developed. Some evidence of coherence; writing choppy.	Thoughts/ideas don't fit together logically or coherently. Writing inadequate.	
Conclusion	Makes logical conclusion based on theme. Ties writing together. Details accurate and complete.	Attempts to reemphasize theme, but is not fully developed. Most details are included but writing is wordy.	Summarizes only. Lacks development and many details; hard to follow.	
Technical Aspects	Mechanics do not interfere with the reading of the assignment.	Lack of attention to mechanics flaws the positive effect of the writing.	Mechanics are flawed; the paper's content becomes unclear and less meaningful.	
Total Points (60 points possible)				
Comments:				

Assessment Instrument for Oral Presentations

Name of Presenter _____

Topic of Presentation _____

Date of Presentation _____

The statements below should be evaluated according to the following scale:

5 = **Exceptionally well done**
4 = **Well done**
3 = **Adequately done**
2 = **Some value**
1 = **Of little value**
0 = **No value**

Circle the number that best indicates your assessment of the presentation.

1.	The manner in which speaker introduced her/himself.	5	4	3	2	1	0
2.	The manner in which report was introduced.	5	4	3	2	1	0
3.	Identification of objectives in the presentation.	5	4	3	2	1	0
4.	Manner in which presentation was organized.	5	4	3	2	1	0
5.	Manner in which presentation was delivered.	5	4	3	2	1	0
6.	Degree of enthusiasm projected.	5	4	3	2	1	0
7.	Degree of knowledge of occupational area exhibited.	5	4	3	2	1	0
8.	Degree of professionalism exhibited during the presentation.	5	4	3	2	1	0
9.	Use of visual aids or materials during presentation.	5	4	3	2	1	0
10.	Degree to which the audience was included in the presentation	5	4	3	2	1	0

Total Points ___/50

Comments:

Interpersonal Skills in Marketing

Learner Outcome

D1 Develop effective personal human relations skills for marketing
D6 Participate in problem-solving work teams

Competencies

D1a Define human relations
D1b Identify the importance of self-understanding in establishing effective human relationships
D1c Analyze personal strengths, weaknesses, interests, aptitudes, traits, abilities, and attitudes
D1d Develop a plan of short- and long-term goals
D1e Demonstrate interpersonal skills, such as punctuality, initiative, courtesy, loyalty, and honesty and maintain an appropriate personal appearance

D6a Recognize sources of conflict and identify ways to reduce it
D6b Use creative-thinking techniques
D6c Work as part of a team to achieve marketing goals
D6d Accept criticism and use appropriate criticism
D6e Demonstrate negotiation skills

Objective

Because human relations and teamwork skills are so important, many organizations are providing opportunities for employees to participate in training and development activities that focus on these skills. Attention to the human side of the enterprise is giving employees a better quality of work life. At the same time, employees need to have a heightened awareness of how their interactions, behavior, and performance affect the company's image and profitability. Practice in recognizing good (or poor) human relations, as well as the opportunity to develop good human relations and teamwork skills, will enhance students' employability and advancement.

In this assessment project, students will identify and develop effective human relations skills for a marketing career and participate in problem-solving work teams. Students will identify human relations skills demonstrated by a fictitious employee on her job. In a series of scenarios, students will role play human relations and teamwork skills needed to enhance or solve a problem.

Procedures

1. Conduct an introductory lecture, class discussion, or exercise related to the human relations skills needed in marketing. Develop a list of human relations and teamwork skills to display on a chalkboard, bulletin board, transparency, or in presentation software.

2. Have individual or groups of students complete the *A Day in the Life Worksheet*. The students should identify the human relations skills the employee demonstrates and write the actions she should take to deal with the guests. At the end of the scenarios, debrief the class by extending the exercise to other marketing positions.

3. Divide the class into groups and give each group the *Role Playing a Department Meeting* script. Each student should be assigned different roles—one student as the supervisor, three or four students (depending on the size of the groups) as employees. After the role playing is complete, the group should come up with a solution. Debrief each group by discussing how they arrived at a solution, the different roles that each student played, and how the supervisor was able (or not able) to "guide" the group to a solution. Discuss the advantages and disadvantages of group decisions.

4. Give each student a copy of the *Using Creative Thinking to Solve a Problem* worksheet. Ask the students to individually read the scenarios and write down a possible solution.

5. Divide the class into groups. Assign a different scenario from the *Using Creative Thinking to Solve a Problem* worksheet to each group. Ask each member of the group to share his/her possible solution with the other group members. The group must agree on one possible solution. Compare and contrast the individual problem-solving solution with the group problem-solving solution and have the groups answer the following questions:
   - Were there more choices of solutions in the group rather than as an individual?
   - Was the quality of the group solution better than the individual solution?
   - What human relations and teamwork skills were displayed in the groups?

6. Have students write a short synopsis of the importance of human relations and teamwork skills in marketing. A self-evaluation of their own human relations and teamwork skills may be appropriate. Use the written assignment assessment instrument to evaluate the synopsis. The synopsis and the self evaluation could be included in the student's portfolio.

7. Complete the *Group Evaluation Checksheet* while walking around during the group work, or have each member of the group complete the checksheet and average the scores for a final score.

Alternative Activities

After participating in these scenarios, ask students to write a script for a situation that has occurred in their workplace. Role play the scenario.

Extend the scenarios in number 4 into scripts for role-playing purposes.

A Day in the Life Worksheet

Melinda Adkins works the afternoon shift at the front desk of a large Kansas City, MO, airport hotel. She works in a fast-paced environment and her work constantly changes due to the diverse needs of guests. She is required to have an in-depth knowledge of hotel procedures and project a good company image. After reading the scenerios below, identify the human relations skills Melinda demonstrated and write the actions she should take to deal with the guests

1. She is approached by an older guest in a wheelchair who has arranged for a late checkout. As he approaches, Melinda takes note of his special-needs situation and arranges transportation to the airport and help with his luggage. What is her approach to this guest and what special handling can she offer?

2. Melinda presents him with his bill and asks him to review the charges. He claims that a health club fee is wrong, insisting that he didn't even use the health club. How should Melinda respond to this situation? What actions should she take?

3. The guest decides to leave his charges on the credit card that he used when he checked in. Melinda completes the check-out process. What should Melinda say to conclude the transaction? What are some of the guest's possible responses to her handling of his checkout?

4. During the check-out process, the guest mentions that he is traveling to Miami next month and hopes he can find nice accommodations there. She asks him to fill out the hotel's comment card while she arranges for the bellperson to handle his luggage. He fills out the card, and the bellperson comes to help the guest into the shuttle. What might Melinda suggest to the guest about accommodations in Miami? How can she assist the guest further here?

5. Melinda next arranges to mail bills to guests who have used the video checkout but didn't pick up their bills at the front desk. The telephone rings, and a guest requests that clean towels be sent up to her room. What actions should Melinda take to handle this request?

6. A man in his thirties approaches the front desk, explaining that he lost his room key and would like to be issued a replacement key. Melinda asks the guest for identification, but the guest becomes irate, insisting that he's left his wallet in the room. What response should Melinda give to the guest, and what can she do to help the guest?

7. A young couple approaches the front desk and asks Melinda to suggest a nice restaurant in town for dinner. Melinda knows a lot about the services in this hotel. What are some of Melinda's responses to the request?

8. A businesswoman enters the hotel with her husband. Melinda attempts to find the reservation for her but is unable to find it. She searches under the husband's name, but it is not under his name either. Melinda tells the guest that she is having difficulty locating the reservation and asks for patience. She finally finds the reservation under Browne-Hanks instead of Brown-Hanks. She takes the guest's credit card, but the card has been declined. At this point, she realizes the guest is having a difficult time and apologizes for the delay. How can Melinda soothe the guest's worries and at the same time ask for another credit card?

9. To make matters worse, Melinda notes that the room for the businesswoman and her husband has not been cleaned. What are some actions that Melinda can take to maintain the couple's goodwill and, at the same time, take care of getting the room cleaned, getting the couple checked in, and escorted to their room?

10. Another hotel guest approaches the front desk, identifies himself, and asks Melinda to telephone the room of a business associate. Melinda directs the guest to the bank of house phones across the lobby. At this time, she also realizes that this is the guest who requested clean towels earlier in her shift. What should Melinda ask the guest?

11. List the human relations skills Melinda used during the above scenarios. How did her actions enhance or detract from the image of the hotel? Did her knowledge of job procedures complement her human relations skills?

Role Playing a Department Meeting

Assume a role to play in this department meeting. There is one supervisor and four employees who will be attending the department meeting. A partial script is provided below. Play your roles until your group comes to a solution. After the role play is completed, evaluate your group's effectiveness according to the human relations skills used, how the supervisor was able to "guide" the group to a solution, and the advantages and disadvantages of using a team approach to solving work problems. The role play should take no more than 10 minutes.

Scenario

Jonelle is the head bank teller and has called her four employees together to try to figure out a way to stop the bottleneck at the tellers' stations during peak times and to avoid customer complaints. Below are some of the statements made during the meeting:

Jonelle: (opening remarks) You are all aware of the bottleneck problem we have. I've called this meeting to try to come up with a solution. I feel that this meeting can help bring us together as a team and help increase our job satisfaction by allowing the group to solve this problem. I'd like to ask each of you to suggest a possible solution. No idea is crazy. Who wants to go first? (After about what seems like 5 minutes, Martha, the informal group leader, interrupts the meeting.)

Martha: I've already given the best solution: hire another teller. There is no need to keep asking for ideas.

Jonelle: Martha, we're trying to come up with as many ideas as possible.

Martha: For what? I've got the good solution.

Jonelle: Let's continue thinking about ideas. Who will go next? (Martha looks around the group with an expression that says "be quiet." After 2-3 minutes, no one makes a suggestion, so Jonelle speaks.)

Jonelle: Let's analyze the alternatives we have in order to determine which is the best.

Martha: Mine is the best.

Will: Wait a minute, Martha, my idea is as good as yours or better: to open the Loan window during rush hours. Tell us why yours is so much better than anyone else's.

Gretchen: Now that Will has said his piece, I'd like to offer my suggestion: to bring someone from the bookkeeping section to help us during peak times.

Holly: Sounds good to me; I like Gretchen's idea.

Martha: I will tell you why my idea is so much better if everyone else will.

Jonelle: Wait a minute; these ideas are the group's, not just any one person's. We want to work as a team. (Will and Martha continue to battle it out. Their two ideas seem to be the most popular. With the battle on, Jonelle knows the group will not agree to one solution.)

Continue playing your role to reach a group decision.

Using Creative Thinking to Solve a Problem

Below are 5 situations calling for creative thinking to make a decision. Write down your suggested solution to the situation; share your idea in a group. As a group, decide on the best solution to the situation.

1. Your company has a new competitor. Your organization's revenues have been dropping. You have been told to increase the advertisements for your product in more markets. Right now, your advertising has been targeted to young people in print media. What are your ideas?

   Individual:

   Group:

2. Your boss has called you on the telephone to tell you that someone has requested an order for your department's product with a very short delivery date. Your boss asked you to call him back in 15 minutes with the decision about taking the order. Looking over the work schedule, you realize that it will be very difficult to deliver the order on time. What can be done to accept this order?

   Individual:

   Group:

3. A customer has offered you a contract for your product with a quick delivery date. The offer is open for two days. Meeting the contract deadline would require employees to work nights and weekends for six weeks. You cannot require them to work overtime. Filling this profitable contract could help get you the raise you want and feel you deserve. However, if you take the contract and don't deliver on time, it will hurt your chances of getting a big raise. What can be done to resolve this situation?

   Individual:

Group:

4. You have developed a new work procedure that will increase productivity. Your boss likes the idea and wants you to try it within a few weeks. You view your fellow workers as capable and believe that they will be receptive to the change. How do you go about suggesting the new work procedure to your fellow workers?

   Individual:

   Group:

5. Flextime has become popular in your organization. Some departments let each employee start and end work when they choose. However, because of the contact your department has with customers, it is imperative the employees work the same eight hours. There is growing discontent with this arrangement. What are your ideas for changing the hours or for keeping the hours the way they are?

   Individual:

   Group:

Checksheet for Evaluation of Teamwork/Creative Thinking Exercises

For each statement listed below, assign a rating for the items to be evaluated based on the following scale:

10 = **Excellent**: The group successfully completed the activity and displayed appropriate teamwork skills.

8 = **Good**: The group completed the activity and displayed teamwork skills but needed to be reminded to include all members.

6 = **Average**: The group completed the activity with consensus, but not every member of the group participated.

4 = **Needs Improvement**: The group completed the activity without reaching consensus; some members were dissatisfied with final outcome.

2 = **Not Acceptable**: The group needs additional time to develop consensus and teamwork skills; final decision was not forthcoming.

0 = The group did not complete the assignment

10-8 points	6-4 points	2-0 points	Activity
			Demonstrated ability to work together as a group. All members participated.
			Final decisions were better as a team than as individuals.
			Discussed a variety of alternatives before arriving at the final decision.
			The final decision was accepted by every member of the group.
			High morale was maintained during the group discussions; all members were more satisfied with the final decision.
			Total Points

Suggested Answer Sheet for A Day in the Life Worksheet

1. Greet cheerfully; ask if he requires transportation to the airport. If he says yes, then arrange for the wheelchair-accessible shuttle with Transportation. Could alert Bell Station of special needs for help with luggage.

2. Melinda calls the health club to find out that the charge has been misapplied; she removes the charge from the bill and presents a new bill.

3. Asks how his stay was; responds to either cheerful evaluation or other. Despite the response, Melinda stays cheerful and upbeat. A smile is *always* appropriate!

4. Melinda gives him the telephone number for Reservations at the property by the same chain in Miami (or if the dates for travel are known, she could make the reservations for him). She asks for a bellperson to handle the luggage and assist the guest into the van.

5. Melinda confirms the room number and calls Housekeeping to have towels delivered right away.

6. Melinda states the security policy of the hotel: For the guest's protection, she cannot issue another key without proper identification. She explains that she must have Security escort him to his room to retrieve the proper I.D. She calls Security. Discuss: How does one maintain good human relations skills when another person loses his temper?

7. Melinda's first response is to suggest the hotel's fine restaurant on the top floor. If the request is for dining in town, she refers the couple to the Concierge desk. The Concierge desk also has information about transportation and other events, if needed.

8. Melinda remains calm and in control of her emotions while searching the reservation database. She assures the guests that she is doing her best to find the reservation. When the credit card is declined, she must delicately ask for an alternative credit card. (It may be helpful here to role play the situation.)

9. She offers a tour of the property while waiting for the room; she could present a complimentary drink coupon for the lounge. She informs the couple of the length of the wait (possibly 30-45 minutes). When they return, she calls for the bellperson to escort the couple, with luggage, to their room. Should the bellperson expect a tip in this situation?

10. Melinda may ask the guest if the towels were received—recognition and concern are two very important aspects of her job.

11. Answers will vary; list the human relations skills on the board; compare the lists with the list made by the class during the lecture.

Interpersonal Skills: Ethics

Learner Outcome

D2 Identify the ethical and social responsibilities of marketing

Competencies

D2a Describe the social obligation of marketing
D2b Describe ethical behavior in marketing
D2c Develop an awareness of safety procedures and health procedures used in business operations

Objective

In this project, students will demonstrate an understanding of ethics by defining ethics, listing ethical traits of marketers, researching ethical and unethical behavior, demonstrating their ethical stature in response to a series of statements, and developing a personal code of ethics. The students will create and present a software presentation.

Procedures

1. Spend a class period discussing ethics and ethics in marketing. Bring in examples or use textbook material to focus students' attention on the importance of ethics in business and personal dealings. Ask students to find (using library or Internet sources) and share an article related to ethics during the class discussion.

2. Discuss the fact that many companies also have developed a code of ethics for their employees. If possible, ask companies in the local community to share their code of ethics with you. For examples, every branch of the armed forces has a code of conduct that may be acquired from a local recruiting office. Ask students who are in co-op or other employment to bring in their companies' code of ethics. Discussion questions might include: Why are codes of ethics necessary? What has prompted companies to develop codes of ethics?

3. Conduct a class discussion where students rate their own behavior by completing the questionnaire *Your Ethics Savvy*. (Evaluation: If they answer yes to one question on the questionnaire, they need to rethink their ethical behavior.)

4. A series of statements, such as those listed below, may provide the basis of class discussion related to ethics. You may want students to use these (and other) statements along with their answers in their formal software presentation.
   - Marketing is of social importance because . . .
   - Ethics is . . .
   - Examples of ethical behavior in marketing are . . .
   - Unethical behavior in business is costly because . . .
   - In the short run, unethical behavior (does/does not) payoff because . . .
   - In the long run, unethical behavior (does/does not) payoff because . . .

5. Devote one class day to students creating a software presentation. Give students a copy of the ***Creating a Marketing Presentation Story Board*** to help them organize their presentation.

6. Devote one class day time to the students giving their formal software presentations.

7. Have the students turn in hard copies of their presentations for evaluation. There are 150 possible points for the project: 100 points for the software presentation and 50 points for technical knowledge of the presentation software.

Alternative Activity

Use groups to complete this activity.

Your Ethics Savvy

Place a check mark (✓) in the box that describes your ethics savvy of the following statements:

Yes	No	Statement
		1. I come to work late and get paid for it.
		2. I leave work early and get paid for it.
		3. I take long breaks/lunches and get paid for it.
		4. I call in sick to get a day off when I'm not sick.
		5. I use the company phone to make personal long-distance calls.
		6. I mail personal things through company mail.
		7. I take home company supplies or merchandise.
		8. I give company supplies or merchandise to friends or family.
		9. I put in for reimbursement for meals and travel or other expenses that I did not actually eat or make.
		10. I use company vehicles for personal business.
		11. I take friends/family out to eat on business trips and charge it to the company expense account.
		12. I accept gifts from customers/suppliers in exchange for giving them business.
		13. I run my own personal business on company time.

(**Note**: Many of these statements may not apply to you now, but they are worth thinking about for your future employment.)

Creating a Marketing Presentation Story Board

Write in your ideas for your software presentation in the spaces provided before preparing your presentation:

Name of presentation:	Objectives of presentation:
Definition of ethics:	Explanation of why ethics is important in marketing:
Examples of ethical situations or decisions marketers must make: (2-3 slides)	Examples of ethical or unethical behavior: (2-3 slides)
Personal code of ethics:	Conclusion:

Assessment Instrument

Directions

Use the dimensions of the assessment instrument to rate the student's ethics software presentation:

Criteria	Demonstrated Competence (20 points)	Satisfactory Competence (16 points)	Inadequate Competence (12 points)
Communications (Overall)	Excels in explanation of ethics.	Acceptable explanation of ethics.	Not yet acceptable; needs to reconceptualize ethics.
Creative Thinking	Uses a variety of software layouts; evidence of thought in planning and presentation.	A variety of layouts used, but not always appropriate; some planning is evident.	Only one or two layouts are used in the presentation; no evidence of planning for the presentation.
Ethical Responsibilities	Demonstrates knowledge and understanding of ethics in marketing.	Sometimes does not check the accuracy or validity of example; satisfactory knowledge of ethics.	Inadequate understanding and knowledge of ethics.
Informed Citizenship	Takes necessary time to read, ask questions, and understand information before communicating.	Only satisfactory number of facts are checked or understood before communication; depth lacking.	Does not take time to check facts, ask questions, or try to understand; reacts.
Initiative	A self starter; allows enough time to complete work in a timely fashion; a recognized leader.	Satisfactory planning; presentation is average.	Unprepared; no evidence of planning or organization in presentation.
Interpersonal Skills	Works well with others; shares knowledge, shares equipment and resources.	Works well with others with reminders and assistance from group members; satisfactorily uses equipment and resources.	Cannot work with others; always needs assistance and reminders to complete work or job tasks; lacks knowledge of resources or equipment.
Problem Solving	Logically and thoughtfully approaches task or problem to be completed or solved; able to apply understanding of ethics to new situations.	Identifies problem and, with assistance, can apply understanding of ethics to new situations.	Cannot identify problem or task or determine solution or plan; lacks understanding of applying ethics in new situations.
Comments:			

Technical Knowledge of Presentation Software Check Sheet

For each statement listed below, assign a rating for the items to be evaluated based on the following scale:

10 = **Excellent**: The student successfully completed the activity and displayed mastery of the software.

8 = **Good**: The student completed the activity with good quality and mastery; occasionally asked for assistance.

6 = **Average**: The student completed the activity with minimal mastery of the software.

4 = **Needs Improvement**: The student completed the activity without mastering the software; needed major assistance.

2 = **Not Acceptable**: The student needs additional time to master the use of the software.

0 = The student did not complete the assignment.

10-8 points	6-4 points	2-0 points	Activity
			Demonstrated ability to access and use presentation software.
			Information was readable, timely, and accurate.
			Used a variety of layouts in the software to make an interesting presentation.
			All required elements were included in the final product.
			Activity was completed on time.
			Total Points

Training a New Employee in the Checkout Lane

Learner Outcome

E3 Operate a checkout area

Competencies

E3a Balance cash drawer against cash register reading
E3b Handle cash transactions including change-making activities
E3c Maintain records of cash received and bank deposits

Objective

All new employees need on-the-job training. It is helpful to an employer to have experienced employees who can orient and train new employees. Training is a very important skill in today's fast-paced, high-performance workplace. Training and orientation includes introductions to coworkers, tours of facilities, reading and understanding company policies and procedures, and learning proper procedures for completing job duties. The goal of this assessment activity is to give students the opportunity to develop a training aid for a new employee to perform the checkout duties of a business firm. Specifically, the training aid should show a new employee how to balance the cash drawer, handle cash and credit transactions, make bank deposits, and learn the routine of the checkout lane. A well-done job training aid will be an excellent addition to a student's portfolio.

Procedures

1. Have students choose a job aid to develop for training a new employee in the checkout area. (If students do not have experience in this area, they may need to observe workers or talk to managers about the job duties.) The job aid may be one chapter in a company's procedures manual, an orientation manual, a set of forms with explanations, or other ideas.

2. Have students develop the idea for the training aid. During class time, students need to plan the materials they need for the training aid. Teacher assistance should be available during the class time.

3. The training aid should be easy to read and to learn from. At a minimum, the basic contents of the training aid should include the following items:
   - Graphics and drawings,
   - Examples of forms,
   - Appropriate policy statements,
   - Lists of job duties, and
   - Job procedures.

Other items may be added at the students' or teacher's discretion. How students develop and create their job aid will be based on their creativity, knowledge, and experience.

4. Have the students develop the training aid with appropriate software.

5. Have the students share their training aid with another student, ask for feedback, and modify the training aid to reflect appropriate suggestions.

6. Have the students present the final training aid to the class in a short oral presentation in which the student teaches one job procedure. Display the job aid in the classroom. The training aid should be added to the student's professional portfolio.

7. Evaluate the student's training aid and oral presentation. There are 50 possible points for the project: 50 points for the written contents, 50 points for the overall contents of the training aid, and 25 points for professional appearance.

Alternative Activities

This project also could be completed in groups.

The training aids could be evaluated by members of the Marketing Education Advisory Committee to add realism.

A job aid could be developed for one aspect of a job in which students are currently employed. Developing a job aid may be an important part of the co-op experience.

Students may be required to present their job aids to their supervisors for evaluation and feedback.

Performance Checklist for the Written Training Aid

For each statement listed below, assign a rating based on the following scale:

5 = **Excellent**: The student successfully completed the activity and displayed mastery of the procedures; writing clear and precise.

4 = **Good**: The student completed the activity with good quality and mastery; writing mostly clear.

3 = **Needs Improvement**: The student completed the activity without demonstrating mastery of procedures; written procedures unclear and hard to follow.

2 = **Not Acceptable**: The student needs additional time to master the procedures; totally unprepared; written instructions were poor.

0 = The student did not complete the assignment.

1.	Student displays mastery of the checkout area.	5 4 3 2 0
2.	Student displays mastery of the job functions.	5 4 3 2 0
3.	Student displays mastery of the duties of the job.	5 4 3 2 0
4.	Student correctly identifies the procedures for completing the duties.	5 4 3 2 0
5.	Student correctly lists the steps to complete the procedures for each job duties.	5 4 3 2 0
6.	Student tests the steps him/herself after writing the first draft.	5 4 3 2 0
7.	Student revises the procedures in a timely fashion.	5 4 3 2 0
8.	Student keys the procedures in proper format and prints the procedures; creative design.	5 4 3 2 0
9.	Student demonstrates mastery of writing training procedures.	5 4 3 2 0
10.	Student successfully completes the project.	5 4 3 2 0

Total Points _____/50

Marketing Education Assessment Guide

Job Aid Demonstration and Teaching Evaluation

Name _____

Use the following scale to evaluate the job aid demonstration and teaching:

5 = Excellent
4 = Good
3 = Average
2 = Fair
1 = Unsatisfactory
N/A = Not applicable

In presenting and teaching with the job aid, the student:

1.	Selected an appropriate presentation format.	5 4 3 2 1 N/A
2.	Set up the presentation where the job aid could be easily viewed by each student.	5 4 3 2 1 N/A
3.	Had all material ready to use.	5 4 3 2 1 N/A
4.	Defined terms or gave background information when necessary.	5 4 3 2 1 N/A
5.	Presented the sections of the job aid in logical order.	5 4 3 2 1 N/A
6.	Followed his/her written procedures.	5 4 3 2 1 N/A
7.	Asked for feedback/questions during the presentation and training.	5 4 3 2 1 N/A
8.	Observed students to see that they were following the directions.	5 4 3 2 1 N/A
9.	Maintained eye contact with all students.	5 4 3 2 1 N/A
10.	Exhibited a businesslike manner.	5 4 3 2 1 N/A

Total Points _____/50

Performance Criteria:
Excellent 50-40; Good 39-30; Average 29-20; Fair 19-10; Poor 9-0.

Product Assessment: Job Training Aid

Name _____

Yes	No	Statement
		1. Design is original and creative.
		2. Design is tasteful and appropriate.
		3. Quality and care taken in creating the job aid was good.
		4. Procedures were followed.
		5. Formatting and printing are accurate.
		6. Contents are complete.
		7. Feedback was obtained from another student.
		8. Graphics and drawings enhance the written narrative.
		9. Feedback was obtained from supervisor.
		10. Job training aid was added to student's portfolio.
Total Points		_____/25

Suggested evaluation:

Each **yes** is worth 2.5 points.
Each **no** is worth 0 points.

The Inventory Manager: The Hidden Guru

Learner Outcome

E6 Manage inventory

Competencies

E6a Calculate stock turnover
E6b Maintain stock control records
E6c Determine relationships between stock and sales
E6d Interpret break-even points
E6e Interpret stock turnover in relation to department or company operating profits
E6f Check incoming stock and complete stock control records

Objective

Inventory management is a critical part of a company's overall management structure. The jobs of the inventory manager, inventory clerk, stocker, receiving clerk, shipping clerk, and traffic clerk often go unheralded. However, the persons filling these positions often have intimate knowledge of a company's most important assets—its products. The National Retail Federation (NRF) has listed ten tasks that are critical to the successful completion of monitoring and controlling inventory. In this project, students will develop a job description (complete with duties and competencies) for an inventory position based on the tasks developed by the NRF. Students will determine why the task is important and how the task might be demonstrated in specific job-related duties. The completed job description may be inserted into the student's portfolio.

Procedures

1. Conduct an introductory lecture, field trip, guest speaker, and/or class discussion related to the importance of handling a company's inventory. Students who work in this area or work for a company that has a stock inventory program could provide forms, guest speakers, and/or personal experience in the job.

2 Use the information generated in step 1 to create a list of duties and competencies needed for inventory management positions. Leave the list in view of the class.

3. During class time, have the students complete the *Task Analysis for an Inventory Position* form or students also may want to devise their own form.

4. Students will be given class time to complete a *Job Description* for the inventory position. To complete the form, the students need to select an appropriate job title. Many job titles fit this position, including inventory manager, inventory clerk, receiving clerk, traffic clerk, stocker, etc.

The students then complete the form based on the selected title. For instance, if the student selects an inventory clerk, the inventory manager should be listed as the supervisor. Discuss the other parts of the form. The person completing the job description form should be the person in the job; however, supervisors may complete these forms.

4. Have each student share her/his job description with another student, asking for feedback. The student should modify the job description based on appropriate suggestions.

5. Have the student present the final job description to the class in a short oral presentation. The job description should be added to the student's professional portfolio.

6. Have the student turn in the task analysis and job description for evalution. There are 100 possible points for the project: 50 points for theTask Analysis for an Inventory Position form and 50 points for the Job Description form.

Alternative Activities

This project also could be completed in groups.

The job descriptions could be evaluated by members of the Marketing Education Advisory Committee or the local National Retailers Association.

Students may be required to present their job descriptions to their supervisors for evaluation and feedback.

Task Analysis for an Inventory Position

Complete the following task analysis, following the form for the first two items.

Task	Importance	Task-Related Duties
Check in merchandise against paperwork.	To ensure that merchandise is accounted for properly.	Verify in a timely manner that merchandise received is the same as that shown on the purchase order. Record discrepancies on proper form and communicate to proper person.
Assure accurate pricing on merchandise.	To ensure that merchandise is properly and consistently priced by noting discrepancies.	Note discrepancies between assigned prices and recent price changes. Follow company procedures if assigned/marked price is incorrect. Communicate mismarks immediately and reticket with correct item/SKU numbers. Cross reference item/SKU numbers correctly. Ensure marking equipment is set with correct price information.
Review stock and restock as necessary.		
Locate merchandise through inventory system.		
Participate in periodic inventory process.		

Task	Importance	Task-Related Duties
Prepare returned merchandise for resale.		
Return inventory to manufacturer/vendor.		
Initiate and/or respond to requests for merchandise transfer.		
Identify damaged items and handle appropriately.		
Initiate repair order.		

The tasks listed above are those defined by the National Retail Federation.

Job Description Form

Select an appropriate job title, then complete the form based on the selected title.

Name _____ Position _____

Department _____

Supervisor and Title _____

Short explanation of job:

Specific job duties: (List the six most important tasks.)

1

2

3

4

5

6

Equipment used on the job:

Competencies needed by the person filling the job:

Accountability factors: (How much responsibility does the person in this job have for adding to the company's profitability? Check one.)

_____ Main	_____ Shared
_____ Partial	_____ None

Amount of accountability (value in dollars of the inventory): _____

Person completing the job description _____

Task Analysis for an Inventory Position Performance Checklist

For each statement listed below, assign a rating based on the following scale:

5 = **Excellent**: The student successfully completed the activity and displayed mastery of the job and its procedures and tasks; writing clear and precise.

4 = **Good**: The student completed the activity with good quality and mastery; writing mostly clear.

3 = **Fair**: The student completed the activity but lacked in-depth understanding of procedures or tasks; written analysis unclear and hard to follow.

0 = **Not Acceptable**: The student needs additional time to master the procedures; totally unprepared; written product was poor.

1.	Student displays mastery of the inventory position.	5 4 3 0
2.	Student displays mastery of the job function.	5 4 3 0
3.	Student displays mastery of the duties of the job.	5 4 3 0
4.	Student correctly identifies the procedures for completing the duties.	5 4 3 0
5.	Student correctly lists the steps to complete the procedures for each job duties.	5 4 3 0
6.	Student correctly details the importance of each task for an inventory position.	5 4 3 0
7.	Student revises the procedures in a timely fashion	5 4 3 0
8.	Student keys the analysis in proper format and prints the analysis.	5 4 3 0
9.	Student successfully completes the project.	5 4 3 0
10.	Student demonstrates mastery of job analysis.	5 4 3 0

Total Points _____/50

Job Description Form Performance Checklist

For each statement listed below, assign a rating based on the following scale:

5 = **Excellent**: The student successfully completed the activity and displayed mastery of the job and its procedures and competencies; writing clear and precise.

4 = **Good**: The student completed the activity with good quality and mastery; writing mostly clear.

3 = **Fair**: The student completed the activity but lacked in-depth understanding of procedures or competencies; written procedures unclear and hard to follow.

0 = **Not Acceptable**: The student needs additional time to master the procedures, tasks, and competencies; totally unprepared; written products were poor.

1.	Student displays mastery of the inventory position.	5 4 3 0
2.	Student displays mastery of the job functions.	5 4 3 0
3.	Student displays mastery of the duties of the job.	5 4 3 0
4.	Student correctly identifies the competencies for completing the duties.	5 4 3 0
5.	Student correctly lists the equipment needed to handle the job duties.	5 4 3 0
6.	Student correctly details the impact of the job on a company's profitability.	5 4 3 0
7.	Student revises the procedures in a timely fashion.	5 4 3 0
8.	Student keys the job description in proper format and prints the job description.	5 4 3 0
9.	Student successfully completes the project.	5 4 3 0
10.	Student demonstrates mastery of job descriptions.	5 4 3 0

Total Points _____/50

Task Analysis for an Inventory Position Sample Answer Sheet

Task	Importance	Job-Related Duties
Check in merchandise against paperwork.	To ensure that merchandise is accounted for properly.	Verify in a timely manner that merchandise received is the same as shown on the purchase order. Record discrepancies on proper form and communicate to proper person.
Assure accurate pricing on merchandise.	To ensure that merchandise is properly and consistently priced by noting discrepancies.	Note discrepancies between assigned prices and recent price changes. Follow co. procedures if assigned/marked price is incorrect. Communicate mismarks immediately and reticket with correct item/SKU numbers. Cross reference item/SKY numbers correctly. Insure marking equipment is set with correct price information.
Review stock and restock as necessary.	To maximize sales based on existing stock and customer needs.	Request additional stock as required or requested. Prepare out-of-stock lists as required. Review basic stock listing and respond as required. Anticipate seasonal and/or promotional stock needs to meet customer demand.
Locate merchandise through inventory system.	To ensure customer satisfaction in locating merchandise, even if in another store location.	Assist customer in locating merchandise. Complete documentation (if necessary) in timely manner.
Participate in periodic inventory process.	To ensure that the sales associate is familiar with and can work with the inventory system.	Count merchandise on appropriate schedule per company policy. Report broken or damaged items and SKU/ID errors or omissions in a timely fashion.

Task	Importance	Job-Related Duties
Prepare returned merchandise for resale.	To get the maximum sales potential from returned items.	Identify items accurately if in resalable condition. Reprice and reticket merchandise to be resold accurately and in a timely way.
Return inventory to manufacturer/vendor.	To ensure inventory return progresses promptly and smoothly.	Completely and accurately identify merchandise to be returned. Correctly follow store procedures for returning inventor.
Initiate and/or respond to requests for merchandise transfer.	To facilitate the transfer of merchandise between different sites to enhance customer satisfaction.	Initiate transfers in a timely and accurate manner. Follow company policy with respect to merchandise transfers. Notify appropriate individuals in a timely manner if unable to meet transfer request or if it is questioned. Physically prepare merchandise for transfer.
Identify damaged items and handle appropriately.	To implement company and manufacturer's policies and warranties with respect to damaged items.	Take initiative to report or to fix items if possible. Check manufacturer's policy for options in getting item repaired or replaced. Follow company guidelines for selling or returning or otherwise disposing of damaged items.
Initiate repair order.	To reduce the number of damaged items in inventory; this saves money to company and maximizes available inventory to customers.	Complete documents accurately and promptly. Transfer or arrange transfer of merchandise to repair location. Conduct follow-up to ensure repaired goods are returned and appropriately repaired.

Marketing Research: The Tool of Champions

Learner Outcome

F1 Conduct marketing research

Competencies

F1a Identify a marketing research project
F1b Develop a marketing research design
F1c Research the secondary data resources
F1d Gather primary data
F1e Apply sampling techniques to identify the sample population
F1f Prepare a research instrument
F1g Prepare a research report
F1h Present a research report
F1i Explain the use of online marketing databases
F1j Solve marketing problems by using rational decision-making process

Objectives

Marketing research serves an important purpose in business operations: to find out more about potential target markets, the competition, individual customers, and reactions to products or services. This information helps marketers make decisions in a global marketplace. In this activity, students will complete a marketing research cycle by developing a valid market research tool for a local business, community project, or school activity. The information gathered from the target market will be used to select advertising media or select or expand services or goods. The students will explain marketing segmentation variables, such as geographic, demographic, psychographic, and behavioral variables. The group will prepare and present its findings in a formal presentation.

Procedures

1. Conduct an introductory lecture that discusses the following:
   - The steps needed to secure a valid marketing sample and the relationship between the survey sample and the target market. Local businesses, the chamber of commerce, the school district, and government offices are excellent resources for market research.
   - The main steps in the market research process, including defining problems, obtaining data, analyzing data, recommending solutions, and implementing findings.
   - How to develop a valid survey instrument specifically targeted for the selected business.
   - How to analyze the data gathered and make recommendations for media use based on data gathered and media resources available.

2. Have students assume the role of a market analyst in an advertising agency's research department. The agency's goal is to increase the impact of the advertising dollars spent by the merchant or other organization in the local media market. To fulfill the role, students must first be aware of the media available within the local market and then research the business' or activity's target market. To complete this activity, students may participate in all or some of the following background activities:
   - A review of local newspapers for ads or articles by or about the business.
   - A review of advertising methods the business has used in the past. Copies of the business' direct mailings, coupons, radio or TV ads, etc., will aid in this review.
   - Observe clientele for the business or activity for a period of time in order to understand current patrons.

3. Have students develop a simple, but direct, questionnaire and distribute it to the identified clientele (target market). The questionnaire should include questions that measure the impact of the advertising dollar, the customer's profile (including age) and shopping history, and media use. If the survey is developed for a community activity, the client's attendance history should also be gathered.

   The contact list can come from the business' mailing list. If the business or organization does not have a mailing list, one can be generated by the students with the help of someone in the business. Surveys should be distributed on a Saturday. If telephone numbers are available, telephone surveys can be conducted.

4. Have the students analyze the completed questionnaires, using appropriate mathematical tools such as totals and/or percentages. The data should be presented as a graphic, i.e., chart.

5. Have students draw conclusions and make recommendations based on their data analysis.

6. Have the student present their marketing research results to the class and to the representatives from the business for which the survey was conducted.

7. Have the student turn in their research for evaluation. There are 100 possible points for the project.

Alternative Activity

Extend the activity by requiring the groups to develop suggested advertisements (complete with layouts and scripts) for the local media market: print, electronic, radio and/or TV. Require the advertisements to be presented along with the market research analysis.

Assessment for Marketing Research Project

Directions

Rate the student on how well the final marketing research project reflects the steps in the marketing research process: problem definition, survey content, data collection, data analysis, conclusions and recommendations, and overall success of the market research according to the following dimensions:

Criteria	Demonstrated Competence (20 points)	Satisfactory Competence (16 points)	Inadequate Competence (12 points)
Communications	Neat and professional appearance of survey; proper format applied; oral presentation complete.	Survey lacks neatness, incorrect format, technical irregularities detract; oral presentation is adequate.	No evidence of neatness in survey; sloppy and incorrect format, incomplete sections; oral presentation hard to follow.
Creative Thinking	Can identify and apply all elements of marketing research effectively to a business or organization.	Can identify and apply all elements of marketing research with some assistance from the teacher to a business or organization.	Can identify and apply elements of marketing research with major assistance from the teacher to a business or organization.
Ethical Responsibility	Can identify and apply all elements related to ethical development of a marketing research survey instrument.	Can identify and apply all elements related to ethical development and presentation of a marketing research survey instrument with assistance.	Can identify and apply elements related to ethical use development and presentation of a marketing research survey instrument with constant help.
Informed Citizenship	Completes successfully and on time all group work or individual assignments required.	Completes successfully and on time all group work or individual assignments required with only minimal reminders.	Completes successfully and on time any group or individual work assignments required with constant reminders; some deadlines missed or unmet.
Initiative	A self starter; allows enough time to complete work in a timely fashion; a recognized leader.	Sometimes allows enough time to complete work; wastes time; has to be reminded of deadlines.	Work is always late; no evidence of planning or organization; incomplete work.
Interpersonal Skills	Works well with others to complete work; has time to assist with questions.	Works well with others most of the time.	Lacks organization skills to plan work with others.
Problem Solving	Can logically and thoughtfully apply elements of marketing research with no assistance; can think through problems that arise.	Can logically and thoughtfully apply elements of marketing research with assistance from the teacher.	Can solve problems related to elements of marketing research only with constant assistance from the teacher.
Total Points			____/100

Marketing Plan Project: Planning a Profitable Future

Learner Outcome

F4 Examine the development of new products
F5 Plan for product and services in the marketplace
I3 Identify marketing strategies

Competencies

F4a Identify sources of ideas for new products
F4b Identify the methods of screening ideas for new products
F4c Identify the methods used for evaluating a new product idea
F4d Identify the forms and importance of pretesting a product prototype
F4e Describe the stages of product development
F4f Describe the forms of market testing

F5a Explain the role that product/service planning activities play in a company's success in the marketplace
F5b Identify factors that influence product/service planning
F5c Identify the methods of gathering primary marketing data
F5d Apply one or more of the methods to gather primary data
F5e Explain the steps in product planning
F5f Identify types of forecasting used in marketing
F5g Give examples of technology used in marketing planning

I3a Define marketing strategy
I3b Identify factors that affect marketing strategies
I3c Describe a marketing strategy for a given situation
I3d Define marketing mix and identify the elements of the marketing mix
I3e Determine a marketing mix for a product or service

Objective

As a capstone exercise, students will complete a full-scale marketing plan for a business and related product or service following the guidelines outlined in this activity. The objectives of the entire project include the following:

- Students will *demonstrate an understanding of the marketing functions* used in developing a plan for a business.
- Students will *develop a marketing strategy* for a small business.
- Students will *develop a formal marketing plan*.
- Students will *develop promotional plans* for a new business.
- Students will *demonstrate skills in budgeting and financial planning*.

- Students will *create sample promotions* for a small business.
- Students will *analyze the business environment* for a small business.
- Students will *demonstrate use of management functions* involved in planning, organizing, and controlling activities.
- Students will *demonstrate teamwork skills* in planning, organizing, and completing the activity.
- Students will *demonstrate time management skills* by planning, organizing, and controlling the activity *to meet the given deadline*.
- Students will *use computer software* to prepare reports, ad layouts, and promotional plans.
- Students will orally *present the marketing plan* to the class.

The resulting product will be a formal business plan that encompasses planning the product or service to creating the promotional mix to training and evaluating personnel. The formal plan will be presented orally. Included in this project are major marketing concepts: marketing analysis, marketing strategies, and action plans for implementation of the business and related product(s) or service(s).

The marketing plan is a formal document that includes the following parts: title page with business name; student's name; class; date; table of contents with page numbers of the sections, lists of graphics, and appendices; sections I, II, and III, and list of resources used.

Procedures

Section I: Market Analysis (related to Learner Outcome F4)

1. Have the students plan a new business or choose an existing business for the project. Identify a need in the community for a specific business or service.

2. Have the students describe the business according to the following criteria:
   - The type of business—retail, wholesale, industrial, or service;
   - A mission statement for the business or service;
   - The type of market—consumer, business, industrial;
   - The target market, including a description of the customers;
   - The product mix, including a general description of the product/service sold by the business;
   - The location of the business, describing in detail the traffic flow, available parking, and community, building or space;
   - A floor plan or scale model of the business; and
   - A description of staff, rates of pay, personnel policies, etc.

3. Have the students analyze the business environment by researching both external and internal factors related to the proposed business. The research can be conducted using a library and online searches. The students should also contact the chamber of commerce for local information. Topics to research include:

External Factors

- The economy,
- Business laws and regulations pertaining to this business,
- Competition,
- Technology,
- Social factors, and
- Risks associated with this business.

Internal Factors

- Strengths of the business, i.e., consumer demand, pricing structure, location, experienced management, etc.;
- Weaknesses of the business, i.e., lack of experience, location, pricing, low demand, etc.; and
- How risks will be managed by the business.

Some possible Internet sites include

Small Business Administration
www.sbaonline.sba.gov

U.S. Department of Labor
www.dol.gov

U.S. Patent and Trademark Office
www.uspto.gov

Business Resource Center
www.kcilink.com/sbhc

U.S. Copyright Office
lcweb.loc.gov/copyright/

4. Have students turn in a rough draft of the project at this point for feedback.

Section II: Marketing Strategy (related to Learner Outcome 13)

1. Once the students have revised their rough drafts, have them incorporate their marketing goals, which include percent of market share, sales goal, growth of the business, etc.

2. Once the marketing goals have been incorporated, the students should outline the marketing mix for their product/service. The marketing mix should include the following elements:
   - Specific products/services offered;
   - Plans for product distribution, including a distribution chart showing the channels to be used;
   - Pricing strategy, including penetration, skimming, etc.;
   - Promotion strategy, including the following
     - Objectives;
     - A one-month budget;
     - A theme;
     - A one-month promotional mix schedule;
     - Promotional material such as print advertisements, broadcast scripts, direct mail pieces, or home page;

- A description of the visual merchandising plans for displays;
- The training methods used for the sales people; and
- Any plans for sales promotion devices, such as fashion shows, contests, sweepstakes, or free promotional items.

3. Have students turn in another rough draft of project for feedback.

Section III: Action Plans (related to Learner Outcome F5)

1. Have students prepare work schedules and responsibility sheets for employees, showing their individual duties regarding the marketing strategy.

2. Have the students develop their plans for employee motivation/incentive programs that will aid in the success of the marketing plan.

3. Have the students explain the evaluation plans for the marketing plan, which should include the following items:
   - How will promotions be evaluated?
   - How will goals be evaluated?
   - How will analysis of the business be evaluated?
   - How will customer satisfaction be evaluated?

4. Once the marketing plan is complete, have the students prepare a formal class presentation, using visual aids (overhead transparencies, presentation software, handouts, etc.).

5. The final projects can be displayed in the classroom during open houses, advisory committee meetings, etc.

Although the content has been modified, this assessment activity was developed by Nancy Krider, Lake Area Vocational-Technical School, Camdenton, MO.

Marketing Education Assessment Guide

Assessment for Marketing Plan Project

Directions

Use the dimensions of the assessment instrument to rate the student on how well s/he completed the intent of the marketing plan project. The final product should meet the activity's objectives

Criteria	Demonstrated Competence (20 points)	Satisfactory Competence (16 points)	Inadequate Competence (12 points)
Communications	Neat and professional appearance, proper format applied.	Lacks neatness, incorrect format, technical irregularities detract.	No evidence of neatness, sloppy and incorrect format, incomplete sections.
Creative Thinking	Can identify and apply all elements of a marketing plan effectively to a new business.	Can identify and apply all elements of a marketing plan with some assistance from the teacher to an existing business.	Cannot identify and apply any elements of a marketing plan; incomplete knowledge.
Ethical Responsibility	Can identify and apply all elements related to ethical development and presentation of a marketing plan for a new business.	Can identify and apply all elements related to ethical development and presentation of a marketing plan with assistance to an existing business.	Cannot identify and apply elements related to ethical use development and presentation of a marketing plan.
Informed Citizenship	All group work or individual assignments are completed successfully and on time.	All group work or individual assignments are completed successfully and on time with only minimal reminders.	Group or individual work assignments are completed only with constant reminders; deadlines are missed or unmet.
Initiative	A self starter; allows enough time to complete work in a timely fashion; a recognized leader.	Sometimes allows enough time to complete work; wastes times; has to be reminded of deadlines.	Work is always late; no evidence of planning or organization; incomplete work.
Interpersonal Skills	Works well with others to complete work; has time to assist with questions.	Works well with others most of the time.	Lacks organization skills to plan work with others.
Problem Solving	Can logically and thoughtfully apply elements of a marketing plan with no assistance; can think through problems that arise.	Can logically and thoughtfully apply elements of a marketing plan with assistance from the teacher.	Cannot solve problems related to elements of a marketing plan without constant assistance from the teacher.
Total Points			_____/100

Marketing Plan Scoring Guide

Directions

Use the following scoring guide to evaluate levels of performance displayed in the final marketing plan.

Level	Criteria
For the grade of A: The student followed directions completely by:	Including all project sections with evidence of appropriate research. Using proper formats (business report--not outline; page numbers; title page; table of contents (including page numbers, list of tables or graphs, list of references, appendices); correct spelling and clear sentence structure. Choosing an existing business or creating a new one. Meeting the overall project deadline. Using class time appropriately by preparing all rough drafts according to time frame given. Preparing a neat and professional report (keyed in appropriate software and containing computer graphics).
For the grade of B: The project fits the following description:	Some sections missing or incomplete; little research evident. Some format irregularities, such as misspelled words, awkward sentence structure; assigned layout not used. Deadline is met. Evidence of some wasted time (one or two draft deadlines missed). Lacking in neatness.
For the grade of C: The project has:	Many sections missing; no research. Frequent format errors. Deadline is met. Misused time; missing several rough drafts. No evidence of professionalism or neatness.
For the grade of D: The project has:	No evidence the instructions were understood or followed. Incomplete sections. Not met the deadline. Sloppy format and presentation.
For the grade of F:	The project was not submitted.

Promotion Analysis Project: Part 1

It Pays to Advertise

Learner Outcome

G1 Analyze advertising media

Competencies

G1a Identify the major advertising media used to promote sales
G1b Identify the major elements of a print or broadcast advertisement
G1c Compare current promotional material (catalogs, brochures, etc.) sent out to consumers by a business and its competitors
G1d Identify the costs of various advertising media
G1e Analyze print and broadcast advertisements
G1f Explain legal and ethical standards in promotion

This is part one of a three-part exercise entitled Promotion Analysis Project. The project is a capstone activity. However, each part can stand alone if the instructor does not choose to use all of the parts. If the teacher uses all three parts of the exercise, it may be appropriate for students to turn in and present all written and oral reports together. The teacher may consider the entire project as a formal analysis report.

Objective

Retailers generally do not take merchandise to the market. Instead, retail organizations rely on consumers to take the initiative to visit the stores or to place an order by telephone, mail, or on the Internet. To motivate consumers to take initiative, effective retailers supply information and persuasion through retail advertising efforts. By analyzing the effectiveness of a variety of advertising media, students will be made aware of the value of advertising to retailers. This assessment activity is to analyze advertising media by having students visit a department store. Students will prepare a written report and present an analysis of advertising media to other class members.

Procedures

1. Have students choose a local department store or a product line and begin collecting print, broadcast, and other advertisements for the store or product line. Suggest a minimum number of advertisements to collect, e.g., five to ten.

2. Have students bring examples of advertisements to class. Examples include newspapers, magazines, videotapes of commercials, photographs of billboards, or copies of advertisements from the Internet. Review the *It Pays to Advertise Questionnaire* and have students answer the questions related to advertisements.

3. Give students one class day to analyze the advertisements and plan a visit to a department store. During this class time, students should access the Internet to determine if the product/service or store is advertised on this medium. (A good discussion question is: Is the Internet a print or a broadcast medium?) Teacher assistance should be available during the class time. Sources of advertisements on the Internet include:
   - The home pages for search tools.
     Alta Vista
     altavista.digital.com
     Excite
     www.excite.com
     Webcrawler
     www.webcrawler.com
     Lycos
     www.lycos.com
     Yahoo!
     www.yahoo.com
     InfoSeek
     www.infoseek.com
   - Internet shopping malls.
     Internet Shopping Network
     www.internet.net
   - Product line or department store homepages
     The Gap
     www.gap.com
     Amazon.com Books
     www.Amazon.com
     Macy's Department Store
     www.macys.com
     The Music Match
     www.musicmatch.com

4. Have students visit a department store and answer the remaining questions on the *It Pays to Advertise Questionnaire*. Since many of the questions on the questionnaire include interviews with store personnel, adequate time should be allowed for students to conduct on-site interviews or to conduct online research. Questionnaire answers will vary, depending on the store and/or product line observed and evaluated.

5. After students have completed the questionnaire and the department store visit, have them write an analysis of the store's or product's advertising. This step ends part one of the promotion analysis project. If the whole project is completed, this part is worth 50 points. The points are based on the written report and the advertisements collected. If the activity is used independently of the whole project, the activity is worth 100 points: 50 points for the visit and report and 50 points for the number and quality of advertisements collected.

It Pays to Advertise Questionnaire

Directions

Retail advertising includes all paid forms of nonpersonal communication about the store, merchandise, service, or ideas by an identified retailer. Write the answers to the questions below related to advertising in the spaces provided. Be sure your answers are complete enough to prepare a written analysis of the advertising for the store or product line. (The completed questionnaire is worth 50 points.)

1. Does the store use retail advertising?

   [ ] Yes [ ] No

2. Who (name and title) is responsible for planning advertising for the store?

3. What kind of advertising does the store use? (Check all appropriate responses.)

   [ ] Product Advertising [ ] Institutional Advertising

4. What advertising media does the store use? (Check all appropriate responses.)

   [ ] Newspaper [ ] Magazine
   [ ] Radio [ ] Television
   [ ] Outdoor [ ] Transit
   [ ] Yellow Pages [ ] Direct Mail
   [ ] Catalog [ ] Internet
   [ ] Other:

5. Does the store prepare an advertising budget?

   [ ] Yes [ ] No

   If no, why does the store not prepare an advertising budget?

   If yes, how is the budget planned according to time?

   [ ] Weekly [ ] Monthly
   [ ] Every three months [ ] Every six months
   [ ] Other:

If yes, what method does the store use to determine the advertising budget for the departments or merchandise areas? (Check all appropriate responses.)

[ ] Educated guess method
[ ] Competitive parity method
[ ] Buildup method
[ ] Other:
[ ] Percent of sales method
[ ] Objective and task method
[ ] Historical method

If yes, who has input into the budget allocation? (Check all appropriate responses.)

[ ] Advertising director
[ ] Divisional merchandise manager
[ ] Area sales manager
[ ] Other:
[ ] Store manager
[ ] Buyer
[ ] Department or merchandise area manager

If yes, how is the budget allocated across the departments or merchandise areas?

If yes, how is the budget allocated across the media mix?

6. Does the store prepare an advertising plan?

[ ] Yes
[ ] No

If yes, what time period does the advertising plan cover?

[ ] A week
[ ] 3 months
[ ] Other:
[ ] A month
[ ] 6 months

If yes, review and attach a copy of the advertising planning form to the back of this questionnaire. Write in the name of the form here.

If no, why does the store not prepare an advertising plan?

7. Does the store use an advertising agency?

[ ] Yes [ ] No

If yes, what is the name of the agency and where (city and state) is the agency located?

Name:

Location:

8. Does the store use co-op advertising?

[ ] Yes [ ] No

If yes, to what extent does the store use co-op advertising dollars?

If no, why not?

9. What type of advertising objectives are employed by the store? (Check all appropriate responses.)

[ ] Store image
[ ] Traffic generation
[ ] Increasing average purchases
[ ] Increasing profits
[ ] Store positioning
[ ] Special events
[ ] Increasing sales
[ ] Other:

10. Does the store communicate a definite image to the public through retail advertising?

[ ] Yes [ ] No

If yes, describe the image.

11. Does the store have a logo or signature?

[ ] Yes [ ] No

If yes, does the logo or signature emulate the store image communicated to the public through retail advertising?

[ ] Yes [ ] No

Why or why not?

If yes, attach a copy of the store logo or signature to the back of this questionnaire.

12. Does the store conduct formal meetings to discuss upcoming advertising activities?

[ ] Yes [ ] No

If yes, when do the meetings occur?

Who (name and title) attends the meetings?

What is discussed in the meetings?

If no, how are store personnel informed of advertising activities?

13. Does the store monitor and evaluate the effectiveness of advertising efforts?

[ ] Yes [ ] No

If yes, how are advertising efforts monitored and evaluated? (Check all appropriate responses.)

[ ] Structured assessment [ ] Nonstructured assessment

If structured, review and attach a copy of the advertising assessment form(s) to the back of this questionnaire.

If nonstructured, why does the store not monitor and evaluate effectiveness?

14. Does the store advertise in newspapers?

[ ] Yes [ ] No

If yes, answer questions 15-21. If no, go to question 22.

15. In what newspapers does the store advertise? List by name below.

16. What kind of advertising does the store place in newspapers? (Check all appropriate responses.)

[ ] Product advertising [ ] Institutional advertising

17. How does the store select merchandise to be featured in newspaper ads?

18. How intensely does the store advertise in newspapers?

[ ] Daily [ ] Weekly
[ ] Monthly [ ] Other:

19. Do the store's competitors advertise in newspapers?

[ ] Yes [ ] No

If yes, how intensely do the store's competitors advertise in newspapers as compared to the store?

[ ] More intensity
[ ] Same intensity
[ ] Less intensity

20. Does the store measure the effectiveness of newspaper advertising?

[ ] Yes [ ] No

If yes, how is newspaper advertising effectiveness monitored and evaluated?

[ ] Structured assessment [ ] Nonstructured assessment

If structured, review and attach a copy of the assessment form(s) to the back of this questionnaire. Write in the name of the form below.

If nonstructured, why does the store not measure the effectiveness of newspaper advertising?

21. Give a brief summary of the newspaper advertising that has occurred in the store since you started observations with this project.

22. Does the store advertise on radio?

[ ] Yes [ ] No

If yes, answer questions 23-29. If no, go to question 30.

23. On what radio stations does the store advertise? List by call letters below.

24. What kind of advertising does the store buy on radio? (Check all appropriate responses.)

[ ] Product advertising [ ] Institutional advertising

25. How does the store select merchandise to be featured in radio commercials?

26. How intensely does the store advertise on radio?

[ ] Daily [ ] Weekly
[ ] Monthly [ ] Other:

27. Do the store's competitors advertise on radio?

[ ] Yes [ ] No

If yes, how intensely do the store's competitors advertise on radio as compared to the store?

[ ] More intensity
[ ] Same intensity
[ ] Less intensity

28. Does the store measure the effectiveness of radio advertising?

[ ] Yes [ ] No

If yes, how is radio advertising effectiveness monitored and evaluated?

[ ] Structured assessment [ ] Nonstructured assessment

If structured, review and attach a copy of the assessment form(s) to the back of this questionnaire. Write in the name of the form below.

If nonstructured, why does the store not measure the effectiveness of radio advertising?

29. Give a brief summary of the radio advertising that has occurred in the store since you started observations with this project.

30. Does the store advertise on television?

[ ] Yes [ ] No

If yes, answer questions 31-37. If no, go to question 38.

31. On what television stations does the store advertise? List by channel numbers below.

32. What kind of advertising does the store air on television? (Check all appropriate responses.)

[ ] Product advertising [ ] Institutional advertising

33. How does the store select merchandise to be featured in television commercials?

34. How intensely does the store advertise on television?

[ ] Daily [ ] Weekly
[ ] Monthly [ ] Other:

35. Do the store's competitors advertise on television?

[ ] Yes [ ] No

If yes, how intensely do the store's competitors advertise on television as compared to the store?

[ ] More intensity
[ ] Same intensity
[ ] Less intensity

36. Does the store measure the effectiveness of television advertising?

[ ] Yes [ ] No

If yes, how is television advertising effectiveness monitored and evaluated?
[ ] Structured assessment [ ] Nonstructured assessment

If structured, review and attach a copy of the assessment form(s) to the back of this questionnaire. Write in the name of the form below.

If nonstructured, why does the store not measure the effectiveness of television advertising?

37. Give a brief summary of the television advertising that has occurred in the store since you started observations with this project.

38. Does the store advertise in magazines?
[ ] Yes [ ] No

If yes, answer questions 39-46. If no, go to question 47.

39. In what magazines does the store advertise? List by name below.

40. What kind of advertising does the store place in magazines? (Check all appropriate responses.)
[ ] Product advertising [ ] Institutional advertising

41. How does the store select merchandise to be featured in magazine ads?

42. How intensely does the store advertise in magazines?

[ ] Weekly [ ] Monthly
[ ] Quarterly [ ] Other:

43. Do the store's competitors advertise in magazines?

[ ] Yes [ ] No

If yes, how intensely do the store's competitors advertise in magazines as compared to the store?

[ ] More intensity
[ ] Same intensity
[ ] Less intensity

44. Does the store measure the effectiveness of magazine advertising?

[ ] Yes [ ] No

If yes, how is magazine advertising effectiveness monitored and evaluated?

[ ] Structured assessment [ ] Nonstructured assessment

If structured, review and attach a copy of the assessment form(s) to the back of this questionnaire. Write in the name of the form below.

If nonstructured, why does the store not measure the effectiveness of magazine advertising?

45. Give a brief summary of the magazine advertising that has occurred in the store since you started observations with this project.

46. Does the store advertise on the Internet?

[ ] Yes [ ] No

If yes, attach an example of an advertisement for the store or product from the Internet or a copy of the home page for the store or product to the back of this questionnaire. In the space below, write in the URL for the store of product:

47. How long has the store been advertising on the Internet?

[ ] 3 months [ ] 6 months
[ ] A year [ ] Other:

48. Does the store measure the effectiveness of advertising on the Internet?

[ ] Yes [ ] No

If yes, how is Internet advertising effectiveness monitored and evaluated?

[ ] Structured assessment [ ] Nonstructured assessment

If structured, review and attach a copy of the assessment form(s) to the back of this questionnaire. Write in the name of the form below.

If nonstructured, why does the store not measure the effectiveness of Internet advertising?

49. Do the store's competitors advertise on the Internet?

[ ] Yes [ ] No

50. Give a brief summary of the Internet advertising that has occurred for the store or product since your observations began with this project.

Promotion Analysis Project: Part 2

Gizmos and Promos

Learner Outcome

G2 Evaluate promotional activities

Competencies

G2a. Define promotional mix
G2b Describe the potential elements of a promotional mix
G2c Identify the major advantages and disadvantages of different forms of product promotion
G2d Describe the most important factors that management should consider when designing a promotional mix
G2e Describe the role of advertising, personal selling, public relations, and publicity in a company's promotional mix

This is part two of a three-part exercise entitled Promotion Analysis Project. The project is a capstone activity. However, each part can stand alone if the instructor does not choose to use all of the parts. If the teacher uses all three parts of the exercise, it may be appropriate for students to turn in and present all written and oral reports together. The teacher may consider the entire project as a formal analysis report.

Objective

The purposes of retail promotion for stores are to enhance a product or store's reputation, increase customer traffic and sales volume, increase net profit, and stabilize sales volume during off seasons or periods of general business depression. In this project, students will find out how retailers handle product or store promotions, how a product promotion is handled on the Internet, and what kinds of incentives are offered to prospective customers. Students will analyze a retailer's promotional activities for products, services, and goods by visiting a department store to obtain information related to promotional activities. Students will prepare a written report and present an analysis of the promotional activities to other class members.

Procedures

1. Have students choose a local department store or product line and begin collecting promotional items related to the store or product. Suggest a minimum number of items; i.e., three to five items (such as coupons, samples, flyers, etc.) from various media.

2. Have students bring examples of promotional items to class. Review the *Gizmos and Promos Questionnaire*, and have the students use the promotional items to answer the questions related to promotions. Questionnaire answers will vary depending on the promotional items collected and evaluated.

3. Give students one class day to analyze the promotional items and to plan for the visit to the department store—either individually or in small groups. Have the students access the Internet to determine if promotional incentives are offered for the product/service or by the store. Teacher assistance should be available during the class time. Sources of possible promotional items on the Internet include:
   - The home pages for search engines.
     Alta Vista
     altavista.digital.com
     Excite
     www.excite.com
     Webcrawler
     www.webcrawler.com
     Lycos
     www.lycos.com
     Yahoo!
     www.yahoo.com
     InfoSeek
     www.infoseek.com
   - Internet shopping malls.
     Internet Shopping Network
     www.internet.net

4. Have students visit the department store and complete the *Gizmos and Promos Questionnaire*. Since many of the questions on the questionnaire include interviews with store personnel, adequate time should be allowed for students to conduct on-site interviews or conduct online research. Questionnaire answers will vary, depending on the promotional items collected and evaluated.

5. After students have completed the questionnaire and the department store visit, have them write an analysis of the store/product's promotional activities. This step ends part two of the promotion analysis project. If the whole project is completed, this part is worth 50 points. The points are based on the written report and the sales promotion items collected. If the activity is used independently of the whole project, the activity is worth 100 points: 50 points for the visit and report and 50 points for the number and quality of promotional items collected.

Gizmos and Promos Questionnaire

Directions

Retail sales promotion includes activities other than personal selling, advertising, and publicity. Examples are sampling, point-of-purchase, and special events that stimulate quick and immediate consumer purchasing and retailer effectiveness. Complete the answers to the questions below related to promotional activities. Be sure your answers are complete enough to prepare a written analysis of sales promotions for the store or product line. (The completed questionnaire is worth 50 points.)

1. Does the store use sales promotions?

   [ ] Yes [ ] No

2. Who (name and title) is responsible for planning the sales promotions for the store?

3. What sales promotion incentives are usd by the store? (Check all appropriate responses.)

   [ ] Coupons
   [ ] Cents-off bonus packs
   [ ] Point-of-purchase materials
   [ ] Contests/sweepstakes
   [ ] Internet coupons (attach a copy)
   [ ] Samples
   [ ] Premiums
   [ ] Refunds/rebates
   [ ] Special events
   [ ] Other:

4. Does the store prepare a sales promotion budget?

   [ ] Yes [ ] No

   If no, why does the store not prepare a sales promotion budget?

   If yes, how is the budget planned according to time?

   [ ] Weekly
   [ ] Monthly
   [ ] Every three months
   [ ] Every six months
   [ ] Other:

If yes, what method does the store use to determine the sales promotion budget for the departments or merchandise areas? (Check all appropriate responses.)

[ ] Educated-guess method
[ ] Cost-of-goal method
[ ] Historical method
[ ] Other:
[ ] Percent of sales method
[ ] Buildup method
[ ] Objective and task method

If yes, who has input into the sales promotion budget allocation? (Check all appropriate responses.)

[ ] Sales promotion director
[ ] Divisional merchandise manager
[ ] Area sales manager
[ ] Other:
[ ] Store manager
[ ] Buyer
[ ] Department or merchandise area manager

If yes, how is the sales promotion budget allocated across the departments or merchandise areas?

If yes, how is the sales promotion budget allocated across incentives?

5. Does the store prepare a sales promotion plan?

[ ] Yes
[ ] No

If yes, what time period does the sales promotion plan cover?

[ ] A week
[ ] 3 months
[ ] Other:
[ ] A month
[ ] 6 months

If yes, review and attach a copy of the sales promotion planning form to the back of this questionnaire. Write in the name of the form here.

100

If no, why does the store not prepare a sales promotion plan?

6. Does the store use sales promotion co-op dollars?
[ ] Yes [ ] No

If yes, to what extent does the store use sales promotion co-op dollars?

If no, why not?

7. What type of sales promotion objectives are employed by the store? (Check all appropriate responses.)

[ ] Store image
[ ] Traffic generation
[ ] Increasing sales
[ ] Other:
[ ] Store positioning
[ ] Increasing average purchases
[ ] Increasing profits

8. Does the store communicate a definite image to the public through sales promotions?
[ ] Yes [ ] No

If yes, describe the image.

9. Does the store conduct formal meetings to discuss upcoming sales promotion activities?
[ ] Yes [ ] No

If no, how are store personnel informed of sales promotion activities?

If yes, when do the meetings occur?

Who (name and title) attends the meetings?

What is discussed in the meetings?

10. Does the store monitor and evaluate the effectiveness of sales promotion efforts?

[ ] Yes [ ] No

If yes, how are sales promotion efforts monitored and evaluated? (Check all appropriate responses.)

[ ] Structured assessment [ ] Nonstructured assessment

If structured, review and attach a copy of the sales promotion assessment form(s) to the back of this questionnaire.

If nonstructured, why does the store not monitor and evaluate the effectiveness of sales promotion efforts?

Promotion Analysis Project: Part 3

The Eyes Have It

Learner Outcome

G5 Utilize visual merchandising in the promotion mix

Competencies

G5a Identify the basic types of displays used to promote sales
G5b Identify the importance of visual merchandising as it applies to a business image
G5c Select appropriate, seasonal, and timely display merchandise
G5d Identify the basic elements of display arrangement

This is part three of a three-part exercise entitled Promotion Analysis Project. The Promotion Analysis Project is a capstone activity. However, each part can stand alone if the instructor does not choose to use all of the parts. If the teacher uses all three parts of the exercise, it may be appropriate for students to turn in and present all written and oral reports together. The teacher may consider the entire project as a formal analysis report.

Objective

In this activity, students will evaluate displays of merchandise in a selected store or for a selected product, good, or service. An analysis of how products, goods, and services are displayed in the Internet environment may be an alternative or additional exercise. Students will visit a department store or access the Internet to evaluate the locations and configurations of merchandise displays. Students will prepare a written report and present an analysis of the displays to other class members.

Procedures

1. Have students choose a local department store or a product line to visit and evaluate its merchandise presentation.

2. Review the *Eyes Have it Questionnaire* in class so that the students are familiar with the interior and floor display components to observe and evaluate prior to visiting the store. During this review, provide time for students to access the Internet and evaluate displays of merchandise in this medium. Teacher assistance should be available during the class time. Sources of possible displays of merchandise on the Internet include:

   - The home pages for search engines. Search for sites using the keywords *shopping malls* or by entering the name of a particular product.

     Alta Vista
     altavista.digital.com

     Lycos
     www.lycos.com

Excite
www.excite.com
Webcrawler
www.webcrawler.com

Yahoo!
www.yahoo.com
InfoSeek
www.infoseek.com

- Internet shopping malls.

  Internet Shopping Network
  www.internet.net
  Shop Internet
  www.ro.com/ShopInternet

  The Branch Mall
  www.branchmall.com

3. Have the students visit the store and use the *Eyes Have it Questionnaire* to evaluate the store's displays. Questionnaire answers will vary, depending on the store and the displays observed and evaluated.

4. After students have visited the department store (or Internet) and completed the questionnaire, have them write an analysis of the merchandise displays. This step ends part three of the promotion analysis project. If the whole project is completed, this part is worth 50 points. The points are based on the written report and the evaluation of the displays. If the activity is used independently of the whole project, the activity is worth 100 points: 50 points each for the visit and report.

The Eyes Have It Questionnaire

Directions

Retail merchandise presentation is the creative and organized means by which the eye appeal of merchandise on the sales floor is enhanced to maximize sales. Complete the answers to the questions below and the two evaluation forms related to merchandise presentation. Be sure your answers are complete enough to prepare a written analysis of the displays. (The completed questionnaire is worth 50 points.)

Interior Display

Note: Select any interior display in the store and answer questions 1-3.

1. Analyze the interior display on the following aspects:

Location of display: (Check one response.)

[ ] In an open space off the main aisle
[ ] On a countertop
[ ] In an interior window space
[ ] In a closed case
[ ] On a wall
[ ] Other:

Classification of display: (Check one response.)

[ ] Institutional
[ ] Promotional
[ ] Other:

Type of display: (Check one response.)

[ ] Selection
[ ] Special
[ ] Point-of-purchase
[ ] Audiovisual
[ ] Other:

Merchandise featured in display: (Check one response.)

[ ] Has proven customer acceptance
[ ] Is being tested for a new trend
[ ] Introduces an important fashion idea
[ ] Is in great demand because of an appealing price
[ ] Other:

Content of display: (Check one response.)

[ ] Unit grouping of merchandise
[ ] Related grouping of merchandise
[ ] Theme grouping of merchandise
[ ] Other:

Arrangement of display: (Check one response.)

[ ] Pyramid
[ ] Zig-zag
[ ] Step
[ ] Fan
[ ] Other:

2. Give a brief description of the interior display. You may want to include a photograph.

3. Evaluate the interior display on the following characteristics. Place a check in the box, to the right of each characteristic, under the term that you believe best describes the level of execution. If the characteristic does not apply, check N/A.

Characteristic	Excellent	Good	Average	Poor	N/A
Enhances value of the merchandise.					
Self-explanatory--customer quickly grasps content.					
Reflects the image of the store.					
Located for maximum visibility.					
Well-lit.					
Appropriate arrangement of merchandise.					
Emphasizes merchandise.					
Clean and neat appearance.					
Creates a desire to own the merchandise.					
Accompanied by well-written signage.					
Overall Evaluation					

Floor Presentation

Note: Self select a **department or merchandise area** in the store and answer questions 4-23 in this section.

Write the department or merchandise area selected below (e.g., housewares, jewelry, juniors, etc.):

4. Attach a diagram of the sales floor fixture layout in the department or merchandise area you selected to the back of this questionnaire. Identify the floor, countertops, and wall fixtures, cash wrap area, stock area, and fitting rooms. The diagram should be drawn to scale. You may want to include a photograph of the sales floor.

5. What classification of floor fixtures is used in the department or merchandise area? (Check all appropriate responses.

[ ] Custom fixtures
[ ] Vendor-supplied fixtures
[ ] Other:
[ ] Conventional fixtures
[ ] Furniture fixtures

6. How are floor fixtures positions on the sales floor in the department or merchandise area? (Check all appropriate answers.)

[ ] Free flow maze layout
[ ] Other:
[ ] Grid system layout

7. How much space is allocated between floor fixtures in the department or merchandise area?

[ ] No set space
[ ] Four feet
[ ] Three feet
[ ] Other:

8. What type of floor fixtures are used in the department or merchandise area? (Check all appropriate answers.)

[ ] Tri-level round rack
[ ] Bins
[ ] Straight 4-arm costumers
[ ] Round rack
[ ] Gondolas
[ ] Cubes
[ ] Straight T-stands or 2-arm costumers
[ ] Waterfall T-stands or 2-arm costumers
[ ] Straight/waterfall 4-arm costumers
[ ] Waterfall 4-arm costumers
[ ] Straight/waterfall T-stands or 2-arm costumers
[ ] Other:

9. How is merchandise presented on the floor fixtures? (Check all appropriate answers.)

[ ] Fashion statement
[ ] Colorization
[ ] Vendor
[ ] Other:
[ ] Classification
[ ] Fabrication
[ ] Merchandise intensification

10. Is colorization used to present merchandise on the floor fixture?

[ ] Yes [ ] No

If yes, describe how color is worked for presentation (e.g., front and back on T-stand with bright in front and neutrals in back, top to bottom in bins with lightest shades on the top row and darkest on the bottom row, etc.).

11. Is pricing used to present merchandise on the floor fixtures?

[ ] Yes [ ] No

If yes, describe how price is used for presentation (e.g., regular-priced items are housed on 2-ways and 4-ways in the median or middle zone; clearance-priced items are housed on round racks in the peak or back zone; etc.).

12. Is sizing used to present merchandise on the floor fixtures?

[ ] Yes [ ] No

If yes, describe how sizes are organized for presentation (e.g., top to bottom in cubes with smaller items on the top row, front to back on T-stand with smallest items in the front, etc.).

If yes, are size rings used on the fixtures?

[ ] Yes [ ] No

If yes, do size rings accompany every fixture?

[ ] Yes [ ] No

If no, why is sizing not used to present merchandise on the floor fixtures?

13. What type of primary or general lighting is used in conjunction with floor fixtures. (Check all appropriate answers.)

[ ] Fluorescent
[ ] Incandescent
[ ] High intensity discharge (HID)
[ ] Other:

14. Does lighting used to accent floor fixtures enhance or accent the merchandise?

[ ] Yes
[ ] No

Why or why not?

15. What classifications of wall fixtures are used in the department or merchandise area? (Check all appropriate answers.)

[ ] Custom fixtures
[ ] Conventional fixtures
[ ] Vendor-supplied fixtures
[ ] Other:

16. What type of wall fixtures are used in the department or merchandise area? (Check all appropriate answers.)

[ ] Garment rods
[ ] Shelving
[ ] Gridwall faceouts waterfall
[ ] Gridwall faceouts straight
[ ] Slatwall faceouts waterfall
[ ] Slatwall faceouts straight
[ ] Other:

17. How is merchandise presented on the wall fixtures? (Check all appropriate answers.)

[ ] Fashion statement
[ ] Classification
[ ] Colorization
[ ] Fabrication
[ ] Vendor
[ ] Merchandise intensification
[ ] Other:

18. Is colorization used to present merchandise on the wall fixtures?

[ ] Yes
[ ] No

If yes, describe how color is worked for presentation (e.g., bright color scheme, pastel color scheme, pastel and neutral color scheme, bright and neutral color scheme, repeating color scheme, left to right on garment rods with lightest shades on the left and darkest shades on right, top to bottom in bins with lightest shades on the top row and darkest shades on the bottom row, etc.).

19. Is pricing used to present merchandise on the wall fixtures?

[ ] Yes [ ] No

If yes, describe how price is used for presentation (e.g., regular-priced items are housed on faceouts, clearance-priced items are housed on garment rods, etc.).

20. Is sizing used to present merchandise on the wall fixtures?

[ ] Yes [ ] No

If yes, describe how sizes are organized for presentation (e.g., left to right on garment rods with smallest items on the left, etc.).

21. What type of primary or general lighting is used in conjunction with wall fixtures? (Check all appropriate answers.)

[ ]Fluorescent [ ] Incandescent
[ ]High intensity discharge (HID) [ ] Other:

22. Does lighting used to accent wall fixtures enhance or accent the merchandise?

[ ] Yes [ ] No

Why or why not?

23. Evaluate the floor presentation of merchandise on the following characteristics. Place a check in the box to the right of each characteristic, under the term that you believe best describes the level of execution. If the characteristic does not apply, check NA, not applicable.

Characteristic	Excellent	Good	Average	Poor	N/A
Enhances value of the merchandise.					
Self-explanatory and quickly grasped content.					
Reflects the image of the store.					
Located for maximum visibility.					
Well-lighted.					
Appropriate arrangement of merchandise.					
Emphasizes merchandise.					
Clean and neat appearance.					
Creates a desire to own the merchandise.					
Accompanies by well-written signage.					
Overall Evaluation					

Display Window: Focus on Visual Merchandising

Learner Outcome

G5 Utilize visual merchandising in the promotion mix

Competencies

G5a Identify the basic types of displays used to promote sales
G5b Identify the importance of visual merchandising as it applies to a business image
G5c Select appropriate, seasonal, and timely display merchandise
G5d Identify the basic elements of display arrangement

Objective

This activity evaluates students' knowledge of promotional mix, product promotion, and display techniques. It is the capstone activity for a unit on promotional mix. In this activity, students will be involved in selecting, arranging for, and displaying a mix of products, goods, or services from businesses in the local community. Window displays will be created in prominent locations in the school building.

Procedures

1. Divide the students into groups, and have them choose the merchandise they want to display. Have them tour the school building and select prominent locations for their display. (Locations may need to be assigned to avoid duplication.)

2. Have the groups choose a business with seasonal and appropriate merchandise. Have the students contact the business, acquire the merchandise and display materials, set up the display, and return the merchandise at the end of the activity. All of these elements are evaluated in this activity.

3. Have the groups write a letter to the selected local merchant(s) that you will sign. (A sample letter is included with this activity.)

4. For security and follow-up purposes, have each group of students ask the merchant to complete the *Merchant Release Form* to verify that merchandise was picked up and returned. The value of the merchandise must also be noted on the form.

5. Arrange for evaluation of the window displays. Invite the merchants who contributed the merchandise to evaluate the window displays. The evaluation forms in this activity have been developed for ease of completion by merchants or other identified individuals.

Although the content has been modified, this assessment activity was developed by Mary Murphy, Hannibal Area Vocational-Technical School, Hannibal, MO.

Sample Letter to Merchant

Letterhead of School

Date

Name of owner
Name of business
Address of business
City, State Zip Code

Dear <name of owner>:

The following marketing students are involved in building a display window at <insert name of school> as a classroom project:

<list of students' names>

The window display will be created on <insert beginning date> and taken down on <insert ending date>.

Your cooperation in allowing us to use merchandise from your store would ensure that you have free advertising at the school and also give students the practical experience that comes from building a window display.

In order to place your merchandise in the display, the attached form must be completed. This form will be kept on file at the high school while the merchandise is on display. You can be assured that your merchandise will be protected and safe during the duration of the display.

If you have any questions, please call me at <insert telephone number>. The display window is located at <insert location>. Please plan to come to see your merchandise while it is on display.

Sincerely

<Teacher's Name>
Marketing Instructor

Enclosure: Merchant Release Form

Merchant Release Form

Name of Store: _____ Phone Number: _____

Address _____

Date Merchandise Obtained From Store: _____

Date Merchandise Returned to Store: _____

Quantity	Description	Price

_____

Signature of Merchant Date Initialed on Date of Return

_____

Signature of Student Date

_____

Signature of Instructor Date

Display Window Evaluation

Name of Window Display:

1. **Power to Attract Attention** ____/20
   Is the theme or idea clever?
   Does the window catch and hold one's attention?

2. **Arrangement** ____/20
   Is an appropriate arrangement/formation technique used?
   Do major items within the display point to the next?
   Does the number of props used relate to the window space available?

3. **Selling Power** ____/20
   Are all props in window related to the current theme?
   Are all props displayed in the lifestyle in which they would really be used?
   Is it possible to find and concentrate on important items?

4. **Cleanliness** ____/10
   Are the floor, background, and window clean?
   Are clothing and merchandise clean, lint-free, and ironed or well pressed?
   If sheets are used, is the backdrop clean and well pressed?

5. **Timeliness** ____/10
   Are items well-chosen for the season?
   Do colors complement the overall display?
   Do colors coincide with the season?
   Is the theme right for the display and season?

6. **Showcards** ____/10
   Do showcards bring out important selling points?
   Are showcards related to the theme and season?
   Are showcards colorful and positioned properly in the display?

7. **Lighting** ____/5
   Does lighting enhance the colors used in the display?
   Are burnt out bulbs replaced?

8. **Technical Excellence** ____/5

Are pins, tape, and tags hidden from view?
Are props used effectively?
Is merchandise folded, draped, or suspended well?

Total Points Received: _____/ 100

Additional Comments:

Individual Evaluation For Window Display

Student's Name:

Name of Display Window

1.	Did the student actively help plan the display?	___/10
2.	Was the display built quickly and with few problems?	___/10
3.	Did the student have a productive attitude when building the window and working with partners?	___/10
4.	Did the student complete his/her fair share of building the window?	___/10
	# of days absent: ___/3	
5.	Were materials used wisely not wastefully?	____/5
6.	Were merchandise release forms used properly?	____/5

Total Points _____/50

Comments:

Student's Final Grade on the Window Display Activity

Display Window Evaluation: _____ (total score) ÷ _____ (# of evaluations) = _____/100

Individual Evaluation: _____/50

Final Grade: _____/150

The Show of Shows

Learner Outcome

H1 Plan a sales presentation

Competencies

H1a Identify ways of dealing with ancillary personnel
H1b Prepare and organize sales aids
H1c Plan a smooth, natural, and interesting sales presentation
H1d Plan for customer's participation
H1e Identify how to analyze customer needs and wants
H1f Identify sources of product or service knowledge

Objective

Salespeople cannot be everywhere all of the time. Therefore, it is critical that sales aids (advertisements, point-of-sale placards, mailers, etc.) are vibrant and creative enough to make a lasting impression. Sales aids help the customer get an overall sense of the product or service and should support the product or service, as well as the reputation of the company. This assessment activity gives students the opportunity to develop sales training aids to support the sales presentation for familiar and unfamiliar products or services. By participating in two exercises, students will identify and work with all the "actors" in the sales presentation (i.e., receptionists, secretaries, customer, other support persons), create and prepare the sales aid, know the elements of the sales presentation, know the types of selling, involve the customer, and access resources for the specific product or service to be presented.

Procedures

1. Have students choose two products or services for which they will develop a sales aid. One product or service should be familiar to the students; one product or service should be unfamiliar to the student.

2. Give the students class time to research information about both the familiar and unfamiliar products or services. Teacher assistance should be available during the class time. It may be helpful to access the home pages of the companies that produce the product or service. (Use Internet search tools to find the home pages.)

3. Provide examples of sales aids in the classroom. The format for the sales aids should be easy to use and present. Have the students observe sales aids in their environment: record shops, bookstores, clothing stores, TV, mailings, fast food restaurants, convenience stores, etc.

4. Have students develop their sales aids in class. Students will need to bring the materials needed to create their sales aids.

5. Have each student share his/her sales aids with another student, asking for feedback. The students should modify the sales aids based on appropriate suggestions.

6. Have the students develop the sales presentation in which the sales aids will be used. At the minimum, the sales presentations and sales aids should include:
   - The purpose of the sales aid.
   - Support for the product or service; i.e., a natural link.
   - Customer participate in the sales presentation.
   - Knowledge of the product or service.
   - Experience with the product or service, where possible.
   - The physical product.

7. Have the students present their completed sales aids to the class in a formal presentation. The sales aids should be displayed in the classroom, school store, or school display case after the presentations.

8. If possible, one sales presentation with the sales aid should be videotaped and evaluated by the student and the teacher. The videotape should be added to the student's professional portfolio. There are 200 possible points for the project: 50 points for each of the sales presentations and 50 points for each sales aid.

Alternative Activities

The training aids may be evaluated by members of the Marketing Education Advisory Committee.

Students may be required to present their sales aids to their supervisors for evaluation and feedback.

Performance Checklist

For each statement listed below, assign a rating based on the following scale:

5 = **Excellent**: The student successfully completed the activity and displayed knowledge of the product or service; sales aid tied in directly with the sales presentation.

4 = **Good**: The student completed the activity with good quality and knowledge of the product or service; sales aid partially complemented the sales presentation.

3 = **Average**: The student completed the activity with minimal mastery and knowledge; sales aid was hastily put together.

2 = **Needs Improvement**: The student completed the activity without demonstrating mastery or knowledge of the product or service; sales aid was inadequate—no clear tie in with sales presentation.

1 = **Not Acceptable**: The student needs additional time to master the activity and learn more about the product or service; totally unprepared.

0 = The student did not complete the assignment.

1.	Student displays knowledge of the product/service.	5 4 3 2 1 0
2.	Student displays knowledge of the purpose of sales aids (print, broadcast, electronic).	5 4 3 2 1 0
3.	Student displays knowledge of the contents of a sales presentation.	5 4 3 2 1 0
4.	Student correctly includes all elements of a successful sales presentation.	5 4 3 2 1 0
5.	Student includes the customer (audience) in the sales presentation.	5 4 3 2 1 0
6.	Student develops a sales aid in which the customer (audience) can participate.	5 4 3 2 1 0
7.	Student revises the sales aid in a timely fashion.	5 4 3 2 1 0
8.	Student demonstrates knowledge (or experience with) of the product or service in the sales presentation.	5 4 3 2 1 0
9.	Student successfully completes the project.	5 4 3 2 1 0
10.	Student demonstrates mastery of planning and presenting a sales presentation with an appropriate sales aid.	5 4 3 2 1 0

Total Points _____/50

Product Assessment: Sales Aid

Name:

Yes	No	Statement
		1. Design is original and creative for media (e.g., print, broadcast, electronic, outdoor, etc.).
		2. Design is tasteful and appropriate (supports product or service).
		3. Quality and care taken in creating the sales aid (neat, color used, lettering clear).
		4. Sales aid demonstrates knowledge of product or service (e.g., displays purpose of product or service).
		5. Presentation could be easily viewed by students.
		6. Contents are complete.
		7. Feedback was obtained from another student.
		8. Sales aid can stand alone.
		9. Feedback was obtained from supervisor.
		10. Sales aid was added to student's portfolio.
		Total Points (50 possible points)

Suggested evaluation:

Each **yes** is worth 5 points.
Each **no** is worth 0 points.

Scripting the Sale

Learner Outcome

H2 Conduct a sales presentation

Competencies

H2a Announce the purpose for the call immediately to the prospective customer
H2b Gain customer's attention with a strong opening remark
H2c Approach the customer, determine needs, and begin the sale
H2d Show how the product or service will satisfy the needs of the customer
H2e Present the features and benefits of a product or service
H2f Overcome customer's objections and excuses
H2g Close the sale
H2h Follow-up to service the sale
H2i Use information on tags, labels, stamps, wrappers, etc. to help the customer buy intelligently
H2j Convert product or service knowledge into selling points

Objective

Telemarketing is becoming a very important method of selling products and services. Many companies and organizations use telemarketing because it offers a less expensive alternative to the high cost of personal selling. In this assessment activity, students develop a telemarketing script for a local service or community organization, business, or school function. Students should work with the organization to determine its target market, the service or product it is seeking to sell or obtain support for, and other related information before creating the script.

Procedures

1. Conduct an introductory lecture and class discussion that includes:
   - The purpose and uses of telemarketing.
   - Companies or organizations that could benefit from telemarketing sales. Examples include credit card companies, chambers of commerce seeking to sell tickets to an annual banquet, volunteer fire departments and rescue squads who are seeking donations, businesses seeking to sell coupon books, etc.
   - The steps to identify the target market and to obtain telephone numbers.
   - The steps in a sales approach that are appropriate for telemarketers.
   - Student experiences with and reactions to telemarketers.

2. Have students assume the role of a telemarketer in a business or other organization and write the script for the sales approach, including customer resistance to the approach. The telemarketing script should be simple and direct, discuss the organization's and product's purpose, gain the

customer's attention, present the features and benefits of the product or service, overcome customer objections and excuses, begin and close the sale, and any appropriate follow-up. Have the students key the script in word processing software.

3. Have the students practice the scripts in a role-play situation with at least two other students in order to receive feedback. Each student should share her/his script at least twice and be the listener at least twice.

4. Have the students turn in their scripts for evaluation. There are 100 possible points for this project.

5. After the scripts have been evaluated, have the students present the scripts to the companies or organizations for which they were developed.

Outline for Telemarketing Script

Company or Organization:

Component	Content
The telephone is answered: What do you say?	
Purpose and Introduction	
Gain attention	
Overcome objections at this point: no time to listen, not interested, etc.	
Show how product or service will benefit listener	
Overcome objections at this point: no interest, already satisfied with present product or service, etc.	
Close the sale	
Follow-up required	
Additional information that may be used during the call	
Comments:	

Assessment for Telemarketing Script

Directions

Rate the student on how well the telemarketing script meets the intent of selling a product or service.

Criteria	Demonstrated Competence (20 points)	Satisfactory Competence (16 points)	Inadequate Competence (12 points)
Communications	Neat and professional appearance of script, proper format applied.	Script lacks neatness, incorrect format, technical irregularities detract.	No evidence of neatness in script, sloppy and incorrect format, incomplete sections.
Creative Thinking	Used a fresh, new approach in telemarketing script to effectively sell a product or service for a business or organization.	Used an acceptable approach in the telemarketing script to sell a product or service for a business or organization.	Some part of the telemarketing script were acceptable to sell a product or service for a business or organization.
Ethical Responsibility	Telemarketing script reflected attention to ethical considerations--content was truthful and honest.	Telemarketing script reflected some ethical considerations--content contained information that had not been researched.	Telemarketing script lacked sensitivity to ethical development due to lack of research into product or service.
Informed Citizenship	Completes successfully and on time all group work or individual assignments required.	Completes successfully and on time all group work or individual assignments required with only minimal reminders.	Completes successfully and on time any group or individual work assignments required with constant reminders; some deadlines missed or unmet.
Initiative	A self starter; allows enough time to complete work in a timely fashion; a recognized leader.	Sometimes allows enough time to complete work; wastes times; has to be reminded of deadlines.	Work is always late; no evidence of planning or organization; incomplete work.
Interpersonal Skills	Works well with others to complete work; has time to assist with questions.	Works well with others most of the time.	Lacks organization skills to plan work with others.
Problem Solving	Telemarketing script reflects logical and thoughtful sales approach; evidence of thinking through problems that arise.	Telemarketing script reflects logical and thoughtful approach with assistance from the teacher.	Telemarketing script reflects problem-solving only with constant assistance from the teacher.
Total Points			_____/100

What Is Marketing?

Learner Outcome

I5 Identify the importance of marketing

Competencies

I5a Explain the importance of marketing in our economy
I5b Define and explain the marketing functions involved in marketing products and services
I5c Explain the marketing concept

Objective

In this activity, students will be introduced to the exciting world of marketing and the full range of functions involved in getting products, goods, and services to the consumer. As consumers, students already have been involved with marketing practices, they probably already know more than they think they do. Students will show their marketing knowledge by creating a poster or collage that defines the importance of marketing in our economy, explains the marketing concepts functions, and illustrates the differences between goods and services. The poster/collage will identify the importance of marketing in society.

Procedures

1. Have students collect newspaper articles, magazines, catalogs, art drawing, and advertisements that can be used on their poster/collage. The students will need to bring these items to class.

2. Give students one class day to create the poster or collage/collage. They may use notes and textbooks to obtain the definitions. The poster or collage should illustrates the importance of marketing in the U.S. economy by including:
   - A definition of marketing,
   - Examples of the activities or functions involved in marketing,
   - The differences between goods and services,
   - A definition of distribution, and
   - An example of a channel of distribution.

3. Display the students' poster or collages in the classroom or in the hall outside of the classroom.

4. Have students conduct a tour of their poster or collage, demonstrating knowledge of marketing concepts, definitions, and products and services.

5. Evaluate the poster or collages. There are 50 possible points for this project.

Alternative Activity:

This project could be completed in groups. Allow time for the groups to brainstorm about the concepts and to plan the materials for the poster/collage. The marketing teacher could assign specific definitions, concepts, or marketing activities to each group. Each group should present its poster/collage to the class.

Instead of creating a poster or collage, students could plan and create the collage on a bulletin board in the classroom or in a display window in the school building.

Although the content has been modified, this assessment activity was developed by Mary Murphy, Hannibal Area Vocational-Technical School, Hannibal, MO.

Poster/Collage Assessment

The checklist below could be used by the teacher and/or the student as a peer- or self-assessment instrument. Suggested evaluation scale: (50 points possible.)

10 = **Excellent**: The poster/collage depicts all aspects of marketing—from conception to final distribution—with pinpoint accuracy.

8 = **Good**: The poster/collage illustrates all aspects of marketing—from conception to final distribution—in most illustrations.

6 = **Average**: The poster/collage shows some aspects of marketing—from conception to final distribution—some illustrations are hard to understand.

4 = **Needs Improvement**: The poster/collage does not illustration all aspects of marketing; student/group needed assistance from the instructor to complete.

2 = **Not Acceptable**: The poster/collage does not illustrate marketing concepts at all.

0 = The student did not complete the assignment.

(10-8 points)	(6-4 points)	(2-0 points)	Activity
			Definition of marketing is clear; aspects of marketing are depicted.
			Activities or functions in marketing are clear (selling, promoting, distributing, planning, etc.).
			Differences between goods and services are accurately illustrated.
			Definition of distribution and channels of distributions are clearly illustrated.
			Aesthetically pleasing (uses color, placement, size, shapes, and attention to detail to present a product that meets criteria and is eye-catching).
			Total Points